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Bayer Center for
Nonprofit Management

Southwestern Pennsylvania
Nonprofit Technology Survey 2008

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About the Bayer Center for Nonprofit Management at Robert Morris University

Since our establishment in 1999, the Bayer Center for Nonprofit Management at Robert Morris University has strived to provide the guidance, tools and information necessary for nonprofit organizations to effectively fulfill their missions. The Bayer Center offers consulting services and non-credit classes in areas such as:

Board Governance
Business Planning
Collaborations and Mergers
Facilities Planning
Financial Management
Fund Development
Human Resources
Legal Issues
Organizational Effectiveness
Strategic Planning

Technology Services:
    Database Development and Enhancement
    Software Application Training
    Software Selection
    RFP Assistance
    Technology Planning
    Web Site Planning and Design

In partnership with the Robert Morris University School of Business, the Bayer Center offers a master's degree in nonprofit management. We also conduct research and provide information and referral to a broad range of resources.

For more information visit http://www.rmu.edu/bcnm

Executive Summary

The IT landscape in area nonprofits has generally improved in the last two years. Some measures show clear plateaus as rates of progress slow to negligible.

Technology Policy

- Technology planning holds steady at a 40% rate; large organizations are more likely to plan for technology than small organizations.
- More IT staff are technology decision-makers than in 2006. Fewer accidental techies and executive directors make "buy or pitch" decisions.
- Tech skills are in half of the region's nonprofit job descriptions, a huge jump from prior years.
- More organization included tech costs in a foundation proposal in 2008 than in 2006.
    - Proposals with tech costs were even more successful (89%) in 2008 than 2006.
    - Majority-technology (but not 100% tech) proposals were the most successful.
- Larger organizations continue to adopt tech best practices at a higher rate than smaller ones.

Computer Systems

- The aging of user workstations has halted but not reversed.
- Only 4% of computers in area nonprofits run Windows Vista.
- More than a third (38%) of all new computers are laptops.
- Wireless Internet jump from 3% in 2006 to 9% in 2008.
- The rate of Internet use by nonprofit employees for work has plateaued in the upper 50s.
- Email draws even with print and phone as a communication tool.
- About one in five nonprofits have upgraded to Office 2007.
- QuickBooks's market share dipped from 62% to 53%.
- The majority of databases used for managing client information, fundraising, volunteer management and outcomes measurement are off-the-shelf solutions, a first in five surveys.
- Norton and Symantec make up more than half of the anti-virus software market.

IT Adoption, Impact and Needs

- Human challenges are among the most-frequently-cited barriers to better IT adoption.
- IT dreams largely focus on web site improvements and gaining internal control of web updates.
- Pittsburgh area nonprofits consider themselves ahead of the curve (despite all evidence).
- Having full-time tech staff makes a strong positive impact on perception of IT adoption.
- A vast majority of nonprofits believe that technology has substantially changed how they operate.

Introduction

On the one hand, it's hard to believe that the Bayer Center has reached is fifth biannual technology survey. On the other hand, our local and national audience looks to us for this analysis, and we would not gladly abandon the tradition we've started. And time has flown by. The survey allows us and our peers to pause and consider in quantitative and qualitative terms what the constant march of technology looks like on the ground in nonprofit organizations. Not to give anything away, but it looks like uneven progress.

Some of the findings have a certain "duh" quality. To express that more positively and articulately, it can be useful to confirm intuition with hard data. Numerical evidence forms a more secure foundation for persuasive arguments for change within individual organizations and across the sector as a whole.

Some results are more surprising. We do our best to explain counterintuitive results by incorporating the Bayer Center's "real life" experience in training and consulting with nonprofits.

We are especially grateful to have sponsorship support from three companies that have considerable interest and presence in the local nonprofit community. TowerCare, Inc., a growing local provider of fundraising software, is our lead sponsor for the 2008 survey project. Its product, called DonorPro, has many Pittsburgh area customers and an expanding national customer base. Allied Insurance Brokers, Inc. and Fifth Third Bank's Charitable Management Services group are supporting sponsors. Both offer products and services that are tailored specifically to nonprofits. All of our sponsors take a keen interest in the success of the nonprofit community and value quantitative measures of progress.

Eight years of data allow us to evaluate trends in the use of technology by nonprofits. If observation did not show you that this is a complex subject, our four pages of questions might signal that. In that complexity, we see a lot of progress. Taken in biannual steps, advances can seem small. Over eight years, the context has morphed unbelievably. Change doesn't always move in a positive direction. Upward trends occasionally reverse themselves. If there's one pattern that marks the 2008 data, it's the plateaus. Steady growth on some measures appears to have stagnated for now. We don't believe that's the last word, and we believe that the occasional technology mistake notwithstanding, backwards steps sector-wide over time aren't really possible.

In measuring technology use, the only constant is change; we alter the survey instrument slightly each year to examine emerging technologies and issues. The new parts of this year's survey focus on emerging communication technologies (web 2.0) and tools for mobile staff members. The complete survey instrument is an appendix to the report. You may find it helpful to review the survey instrument and the response options before reading the analysis. The Bayer Center welcomes the use of the survey instrument in other regions for the sake of comparison.

Finally, we owe a debt of gratitude to those who not only make IT work in their organizations but also take the time to tell us about it in deep detail. This year's sample of 330 organizations is 15% larger than 2006 and our largest ever. We appreciate the 11 "charter" survey organizations that have responded every year, the 193 organizations that have responded more than once and the 128 who participated for the first time this year.

Lead Sponsor

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Responding Organizations

This year's survey drew the largest sample of our five surveys; 330 organizations responded. Responses were collected in summer 2008. The conclusions drawn in this report derive from a diverse and representative sample of the nonprofits in Southwestern Pennsylvania. The majority of organizations had responded in the past. Still, over a third are first timers. Before we delve into findings, this section of the report will summarize the organization type, size, location and age of respondents.

Repeat Status	Orgs	%
Five-Timers Club	11	3%
Four Surveys	47	14%
Three Surveys	73	22%
Two Surveys	71	22%
New in 2008	128	39%

Organization Type

Respondents identify themselves according to the "major 10" categories from the National Taxonomy of Exempt Entities. Because some organizations work in multiple categories, they may choose multiple categories.

The 2008 survey pool breaks down by organization type in very similar proportions to past years. As in prior surveys, more than half of all survey respondents fall into three categories: Human Service, Education, and Public/Societal Benefit. Public/Societal Benefit – the least intuitive name among these three categories – includes advocacy, community development and philanthropy. The smallest categories include Environmental, Mutual Benefit, and International and Foreign Affairs.

Respondents by Organization Type

Religion related 7%
Other 6%
Arts 8%
Education 18%
Environment 4%
Health 10%
Human Service 28%
International, Foreign Affairs 1%
Mutual Benefit 3%
Public, Societal Benefit 14%

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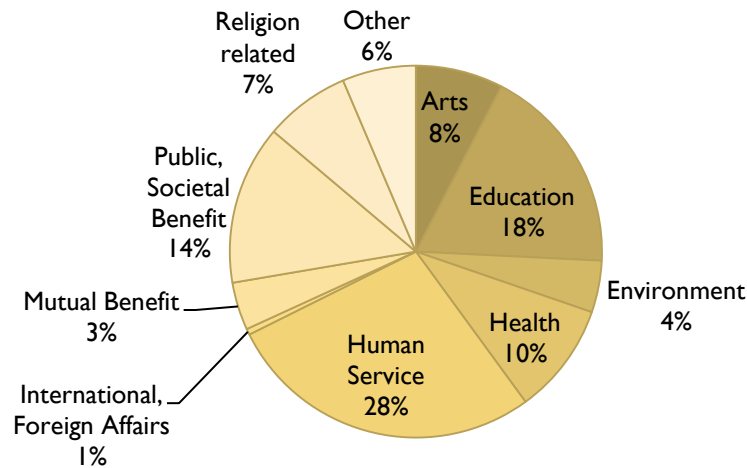
Survey respondents align closely with all of the nonprofits in the region.[1] The survey pool has slightly more Education and Human Services organizations and fewer Public benefit and Religion-related organizations.

Survey Respondents vs. Regional Organizations

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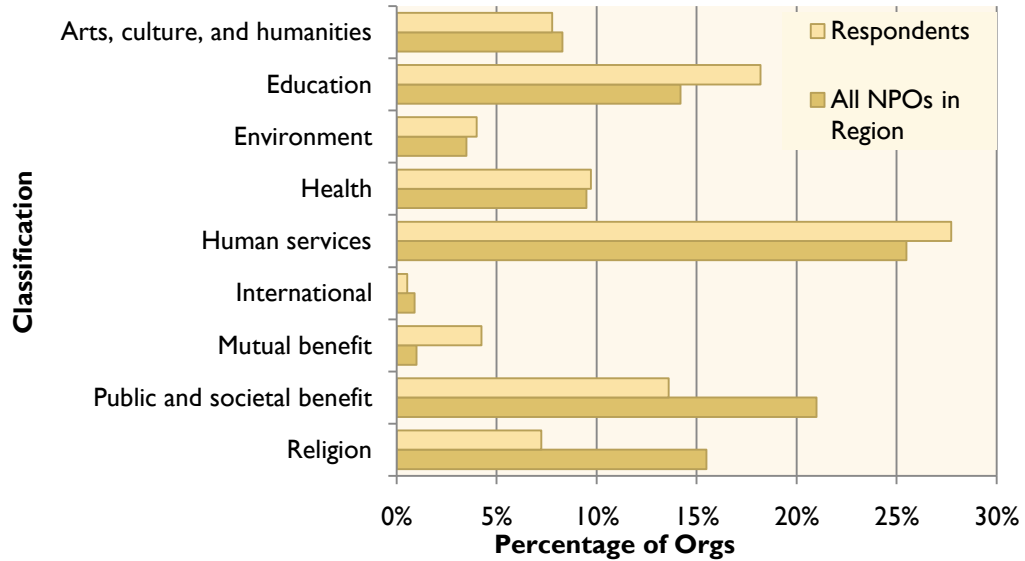
[1] All references to the nonprofits in the region derive from the National Center for Charitable Statistics Business Master File from October 2008. The Business Master File contains all organizations all active organizations registered with the IRS. The region is defined as the following 10 counties: Allegheny, Armstrong, Beaver, Butler, Fayette, Greene, Indiana, Lawrence, Washington, and Westmoreland.

Geography

The vast majority of 2008 respondents (78%) are located in Allegheny County, which falls within the range (69%-85%) of the Allegheny proportion in prior surveys. Of the remaining organizations, 18% are located in the adjacent counties of Beaver, Butler, Fayette, Washington and Westmoreland. The remaining three percent come from outside the immediate Pittsburgh metropolitan area.

Respondents by County

County	%
Allegheny	78%
Westmoreland	6%
Butler	4%
Washington	3%
Fayette	3%
Beaver	2%
Other	3%
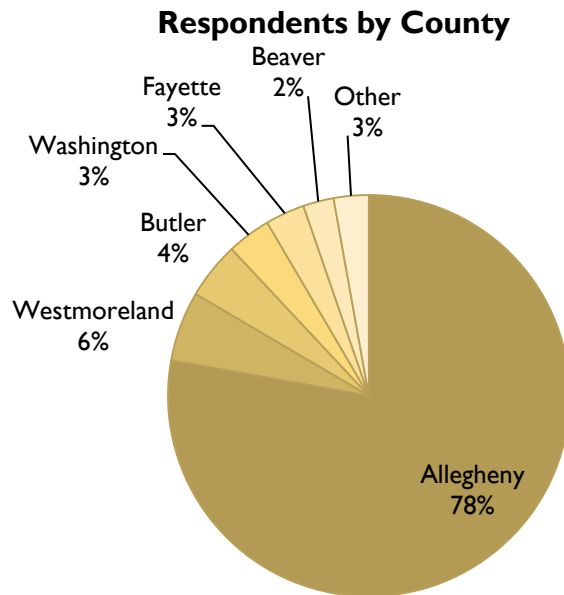
The number of nonprofits in the Pittsburgh region is less dominated by Allegheny County than is our survey pool. Still, the central county in the region has far more nonprofits than any of the neighboring counties that make up the metropolitan area.

Location: Survey Orgs vs. Regional Orgs

County	Respondents	All NPOS in Region
Allegheny		60%
Westmoreland		11%
Butler		5%
Washington		7%
Fayette		3%
Beaver		5%
Other		9%
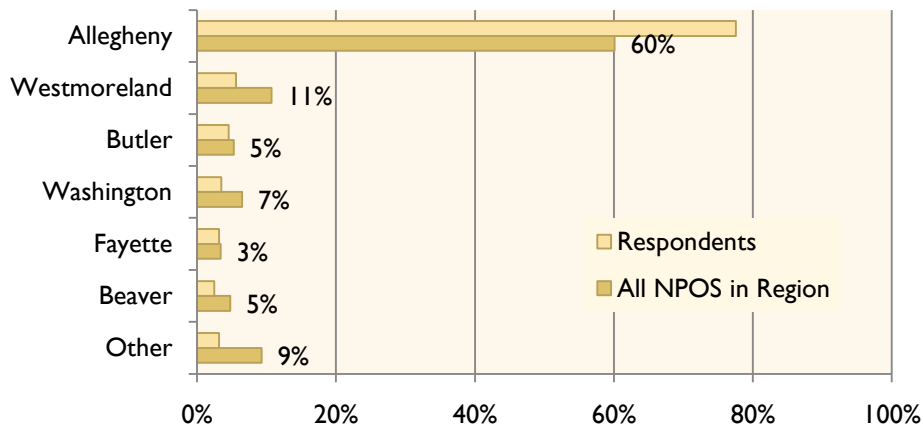
Budget Size

Like nonprofits nationally, the organizations in the respondent pool tend to be small. More than half of the organizations have annual budgets of less than $1 million, and 85% have annual budgets of less than $5 million. The size of the organization definitely influences IT need and IT adoption. The survey pool's smallest budget ($2000) has very different IT requirements and infrastructure from the largest ($160,000,000).

Survey Respondents by Budget Size
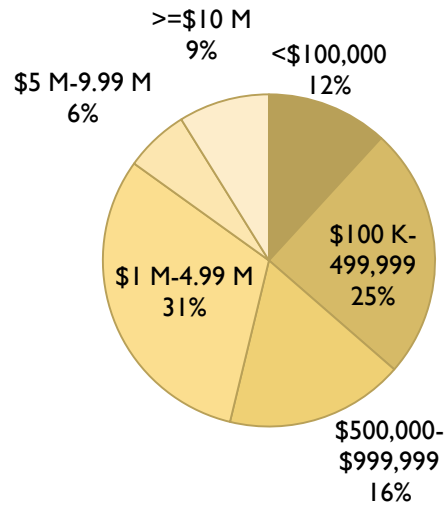
This kind of distribution fits within the pattern established in prior surveys. The 2008 median budget is the highest to date. This year's pool has more $1-5 million budgets and more budgets over $10 million than any previous survey. The growth in those brackets essentially offsets a decrease in the $100,000-500,000 range. That exchange explains the median's skew upward.

Year	Median Budget
2000	$500,000
2002	700,000
2004	645,000
2006	700,000
2008	815,000

Staff Size

Just as the nonprofits represented in the survey are small in budget, they are small in number of employees as well. The small staff – users and IT people – may be an even more important resource constraint when it comes to IT adoption. Half of the respondents employ 7 or fewer full time equivalent (FTE) employees. An additional 16% of organizations have 7-15 employees. At the margins, some organizations are run entirely by volunteers, and the largest responding organization employs 2500 FTEs.

Survey Respondents by Staff Size (FTEs)
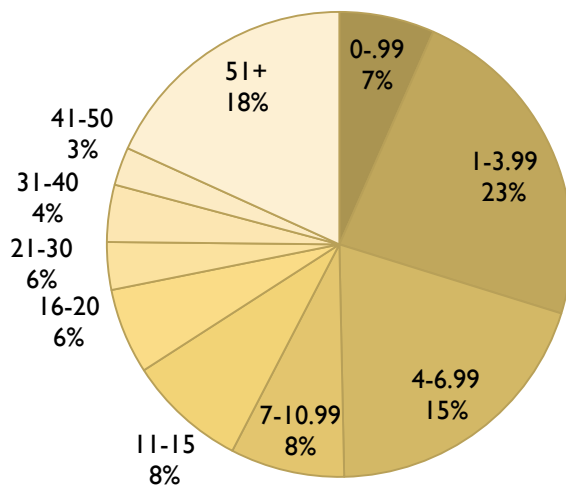
The median staff size is more in line with prior years than median budget size. The 18% proportion with staff sizes over 50 is above the norm. Only 2002 had that many organizations that large. Like in 2002, the 2008 pool has slightly fewer organizations in the three smallest brackets than is typical.

Year	Median Staff Size
2000	6
2002	10
2004	7
2006	6.5
2008	7

Age of Organization

Age can cut both ways in its impact on use of technology. On the one hand, a younger organization has not existed without IT tools being available to it. Whether a new nonprofit adopts the tools is as open a question as whether an older one does, but the recently-founded organizations have developed in an online world. On the other hand, organizations tend to grow over the years, and scale creates efficiencies and critical mass for investment in IT solutions. The 2008 survey organizations mirror the national distribution of nonprofits by age, with the vast majority having been founded since 1960. Over half the organizations were founded since 1980. The median age of organizations is 24 years, up exactly two years from the 2006 survey.

Respondents by Founding Year
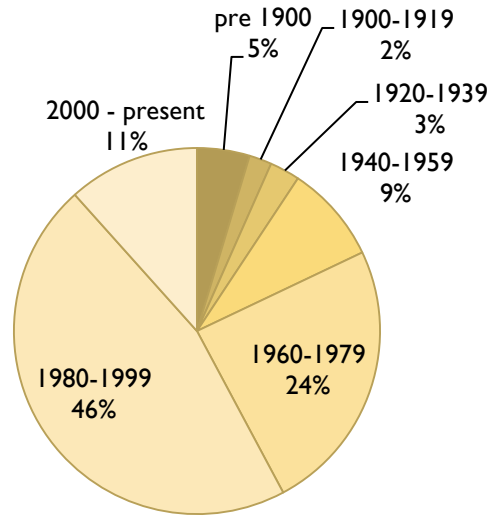
Although the survey orgs are similar in age to the pool of all nonprofits in the region registered with the IRS, the surprising number of nonprofits founded this decade is underrepresented in the survey. The comparison data is based on the 501(c)(3) ruling year of organizations, which may be more recent than the widely accepted founding dates. This discrepancy between any given organization's founding and 501(c)(3) ruling date partially explains the very small number of pre-1940 organizations in the regional comparison data set.

Founding Year: Survey Orgs vs. Regional Orgs
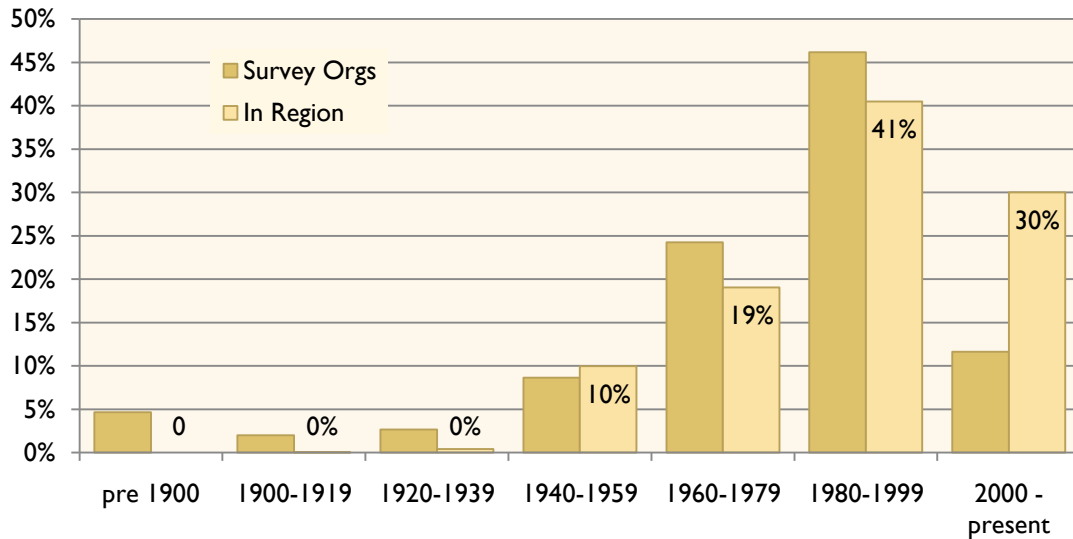
The respondent profile is enumerated in this level of detail in order to reinforce that the snapshots produced by each survey derive from the attributes of similar organizations. More

detailed respondent profile data is available upon request. A complete list of this year's respondents appears as an appendix to this report.

Technology Policy

The Bayer Center's technology initiative focuses, of course, on technology. We really view technology through the management lens, though. IT solutions allow nonprofits to do more with less, record their activities, make data-driven decisions and share their stories. In the words of one respondent "I want records I can use as a management tool." Before we examine "the stuff" nonprofits are using, we look at how they manage "the stuff".

Technology Planning

People sometimes debate whether organizations need technology plans anymore. Detractors base their arguments on opportunity cost, the obsolescence of a plan document in the face of constant IT advances and the idea that the steps to take are so obvious that they don't require a planning process. Let's examine these arguments in the real-world context of today's nonprofits. That's a world in which most organizations are small (under 20 employees), lack a trained technology person, expect staff to wear many hats and run a very lean ship. In light of that, the arguments:

First, the opportunity cost is not negligible. What technology improvements could the planners make with the time and money spent on the plan? Instead of meetings and consulting fees, couldn't we have better hardware and software? Shouldn't the staff better spend that time getting trained? Possibly yes. In many organizations, however, all things being equal, the resources that might be devoted to a tech plan wouldn't necessarily be devoted to IT acquisition or training. Alternatively, if an organization does allocate money and time to tools and training, the probability of systematic improvement increases dramatically with planned and agreed-upon steps rather than a series of one-off decisions. Opportunity cost must be weighed, but for effectiveness and systematic improvement, we choose planned spending reduced by opportunity cost rather than unplanned spending.

Second, IT solutions *do* evolve at a startling pace that does not tarry until the plan is written. New solutions appear all the time, especially in the age of cloud computing. By the logic that external change trumps internal planning, however, no strategic plan would ever get written. For that matter, no dinner reservations would ever get made. Constant flux, both outside and inside the organization, challenge any planning process to maintain currency while planning for a future that is difficult to pin down. We don't work ourselves out of this dilemma, however, by shelving the notion of planning. We work our way out by planning as quickly as possible and executing the plan with flexible decision points.

Third, there are times when the next step in IT growth seems obvious to a technology expert. If an organization lacks a network, they should not dump vast resources into database development yet. If an organization has just adopted a web site that serves as a service delivery tool in itself, efforts should clearly focus on public awareness, ensuring uptime and dynamic content. Too often, however, the decisions are not so clear cut.   For one, multiple issues may present as "next step" barriers. Determining priorities by reading the marketing material of solution providers will make one cross-eyed. Returning to the nonprofit context, steps that may be obvious to an expert are less obvious to those who pick up the IT mantle and spend most of their IT time putting out fires. In organizations with an IT department composed of multiple people with varied expertise, project-to-project tactical planning may suffice. The

problem is that most organizations lack that resource internally and can only hope to come up with plans by composing a committee, maybe getting some outside help and working through a structured, agency-wide process.

From a low in 2000 of 28%, the technology planning rate has hovered in the low 40% range from 2002-2008. The majority of technology plans are part of a broader technology planning process, which makes sense; appropriate technology solutions can only be determined when strategic direction is clear.

Technology Planning

Don't Know/Not Sure 5%

Tech plan independent of strategic plan 11%

No Response 1%

Neither strategic plan nor tech plan 20%

Strategic plan that addresses tech 30%

Strategic plan, doesn't address tech 33%
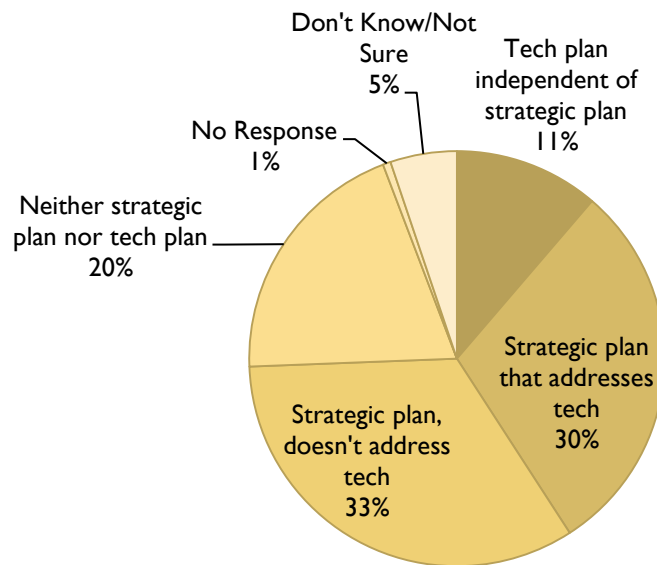
Among all organizations, 41% had a technology plan in 2008. The evidence grew steadily from the 2000 to 2004 surveys that larger organizations are more likely to plan for technology. To simplify "large and small", we use a 20-employee threshold. Although higher than the median staff size, that number marks a place where organizations start to look different. Larger organizations plan at a much higher rate (71%) than smaller ones (30%). After a slight dip in the differential in 2006, the gap expands to the 2004 level this year. Organizations with a tech plan have nearly five times the median staff size (19 vs. 4.25) and seven times the average staff size (108 vs. 15) than those with no tech plan.

Tech Plan by FTE Size
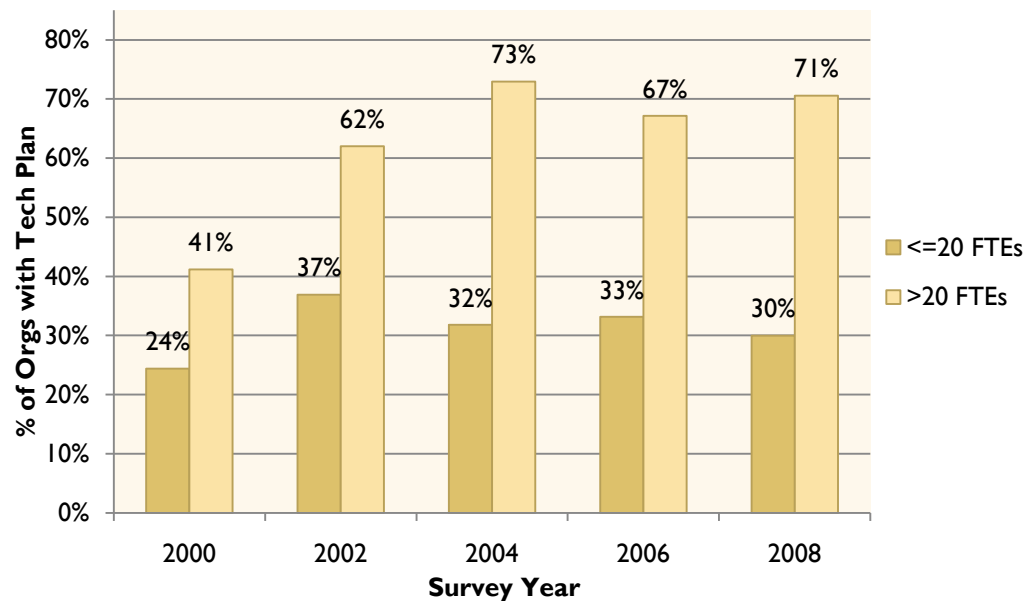
Technology Management

There are a variety of roles and responsibilities in the techie realm. One important task is making the hard technology decisions. Respondents were asked to identify "the primary source of technology decision-making; who decides what gets purchased and what gets thrown away?"

The 2006 survey indicated that tech staff were losing authority in decision-making to groups with less official responsibility. A decrease in staff decision-making was accompanied by an increase in board member and volunteer decision-making. That shift persists in 2008 but is accompanied by a shift away from accidental techies and executive directors making decisions toward IT staff making decisions. On the one hand, more board members, volunteers and consultants are making IT decisions than in earlier surveys. On the other hand, within staffs, full-time tech staff and MIS Department decision-making both increase in 2008.

Technology Management

Chart legend: 2006, 2008

Category	2008 value
MIS Dept	8%
FT Tech Staff	13%
PT Tech Staff	14%
Unofficial Staff	8%
Executive Director	31%
Finance Dept	8%
Other	17%
Don't know/not sure	0%

Other:
- 7% Outsourced
- 6% Board/Volunteers
- 5% Other
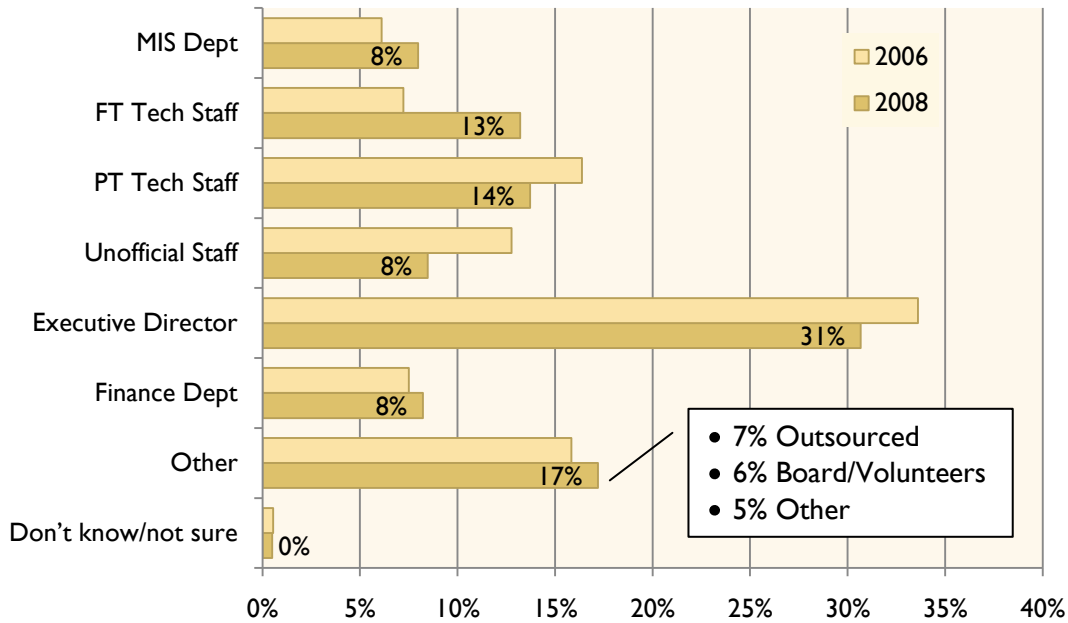
Technology Support

Another key area of "techie" responsibility is support. In fact, the lack of support is one of the most strongly felt challenges to nonprofit IT success; more on that later. Support duties typically sort themselves into routine tasks done by staff and specialized tasks that require outside assistance. Many organizations, therefore, use more than one provider for support; for example, In-house MIS Staff supplemented by contracting for assistance in emergencies or for more technical tasks. Respondents can cite more than one type of tech support per organization in the hart below.

Tech Support

- No formal approach to support 13%
- Friends and family of staff 2%
- Volunteers to our agency 9%
- In-house MIS staff 25%
- Tech support contracts w/1 or more providers 22%
- Contract on an as-needed basis 29%
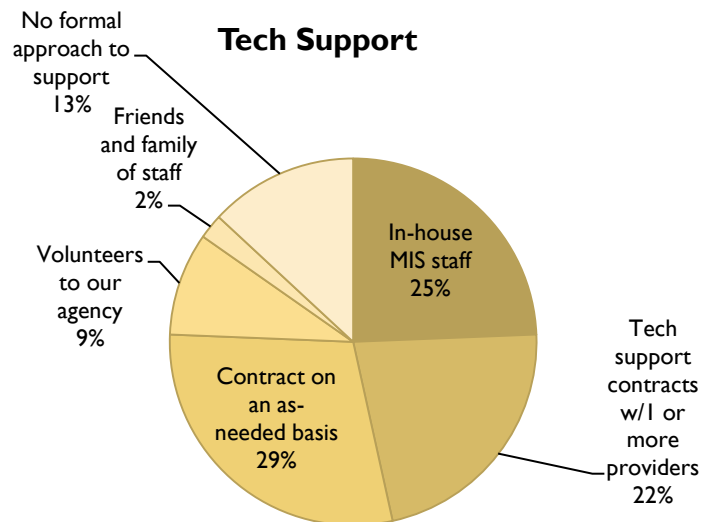
Support, like decision-making, has shifted increasingly to outsiders. The graph below shows the breakdown of primary providers of support[2] over the last eight years. The breakdown is very similar to the 2006 survey with a decrease in "friends of the nonprofit" support apparently offset by contract relationships. A return to the larger proportion of ongoing contracts vs. as-needed support suggests a more planned approach to these relationships. It may also suggest that – at least until the summer of 2008 – confidence in a brighter financial future was up enough to enter into a long-term support relationship rather than waiting for a crisis to call in help.

Tech Support Provision
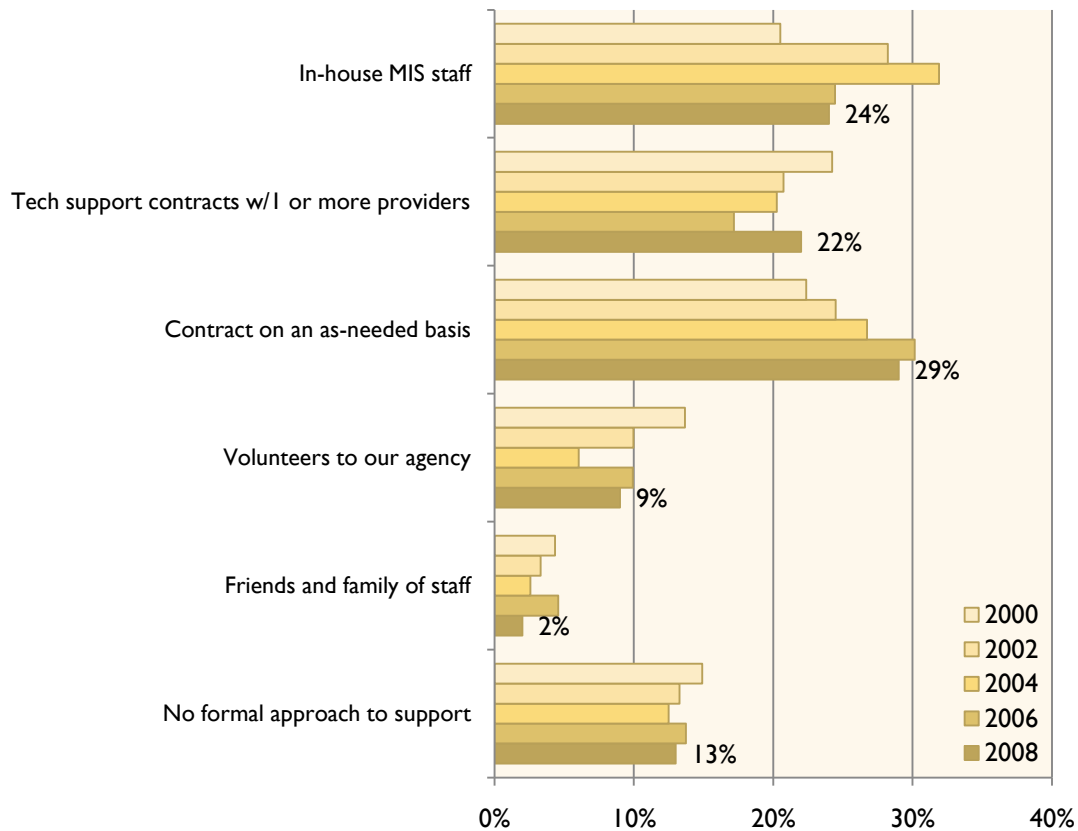
A more detailed examination indicates that the majority of organizations that identify staff as their primary support also use outside providers. This may include an ongoing tech support contract, as-needed consulting assistance or volunteers. Those who use outside support tend to use that source on its own, although some organizations combine their contract support with other providers.

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[2] Primacy is determined in the following order: In-house MIS Staff, Tech Support Contracts, Contract on an as-needed basis, volunteers, friends, no formal approach. For example, an agency that lists both MIS staff and as-needed contracting is counted as MIS staff in the graph.

Tech Support Provision - 2008 Detail

Category	Value
In-house MIS staff	25%
*Staff Only	9%
*Staff plus Other Provider(s)	16%
Tech support contracts w/1 or more..	22%
*Contract Only	17%
*Contract plus Other Provider(s)	5%
Contract on an as-needed basis	29%
*As-needed only	22%
*As-needed plus Other Provider(s)	7%
Volunteers to our agency	9%
Friends and family of staff	2%
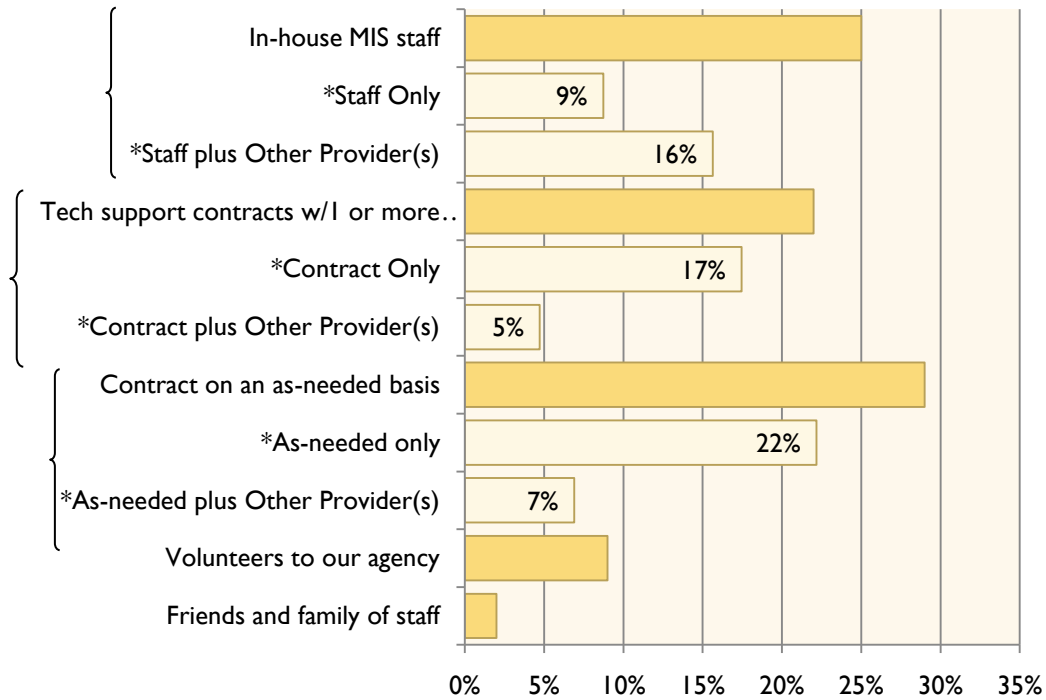
Technology Spending

Aside from marginal changes in the rate survey to survey, the rate of tech budgeting remains near but below half. The organizations that do track and budget for technology expenses continue to be slightly larger than those that don't. Median staff size of the budget group is more than 2.5 times that of the non-budget group (13.5:5). Median budget size shows a similar gap ($1.2M:$500K)

Technology Budgeting

Year	Do not Budget for Tech	Budget for Tech
2000	56%	44%
2002	61%	39%
2004	52%	48%
2006	56%	44%
2008	53%	47%

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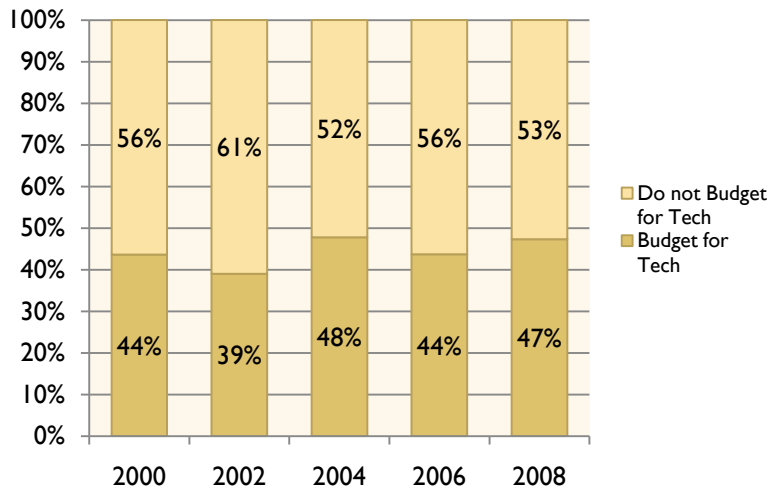
Survey respondents who budget for technology align similarly to technology spending benchmarks this year as in prior years. One benchmark is that technology spending should be 4-6% of overall annual spending. The good news is that the number of organizations in that range doubled from 2006 to 2008 to 10%. The bad news is that 83% of organizations remain below that ratio. Another guideline that ties technology to users is that the tech budget should equal 10% of payroll. Because we don't collect payroll figures in this survey, we are unable to make that comparison.

Tech Budget as % of Total Budget

less than 1%
39%

1-3.99%
44%

4-5.99%
10%

6% and up
7%
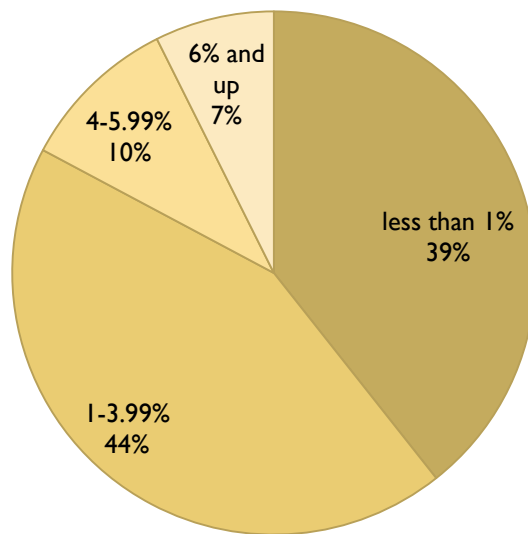
Guidelines for annual spending per machine vary, but experts say that organizations should budget $1000 to $1700 per year with some placing the top end of the range at $3000 annually. The median survey organization spends just under $1000 per computer, unchanged from 2006. The breakdown by ratio aligns pretty closely with past surveys, although it skews slightly lower than the 2004 and 2006 surveys.

Technology Spending per Computer

Under $1000
50%

$1000-1700
22%

$1701-3000
15%

over $3000
14%
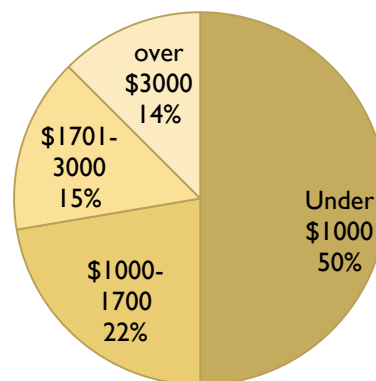
Staff Training

The steady increase in the overall number of nonprofit employees receiving formal technology training continues in this survey. At the organizational level, however, the trend is more ambiguous. First, the progress: a weighted average based on the employees and training rates represented in the sample estimates that 32% of employees in Pittsburgh area nonprofits received technology training in 2008. Because it's a weighted average, this overall number is heavily influenced by larger organizations sending a higher proportion of their employees to training.

Overall Training Rate
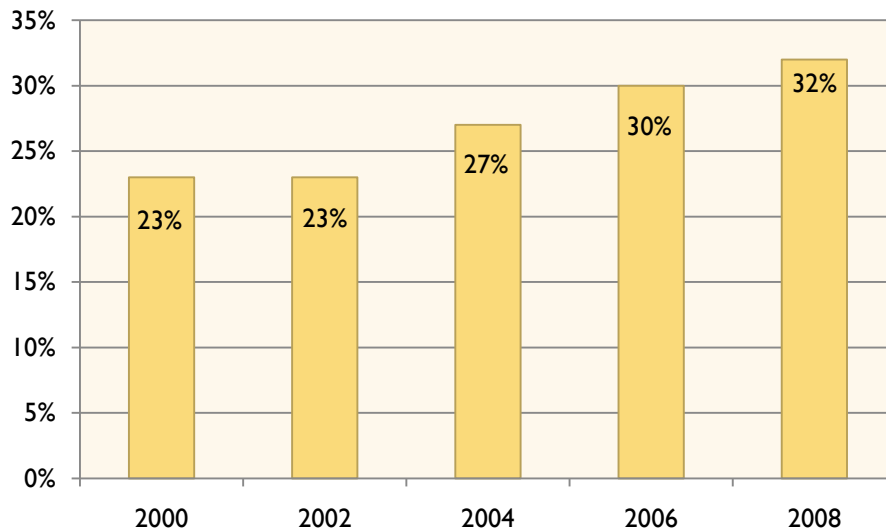
We arrive at this rate by asking what proportion of each organization's staff "received formal technology training" in the last year.[3] That breakdown for 2008 mirrors recent years pretty closely and shows a pattern of a few specialized staff members receiving technology training. Anecdotally, we have observed an increase in all-staff training with the adoption of Microsoft's latest operating system (Vista) and Office suite (2007).

Staff Technology Training
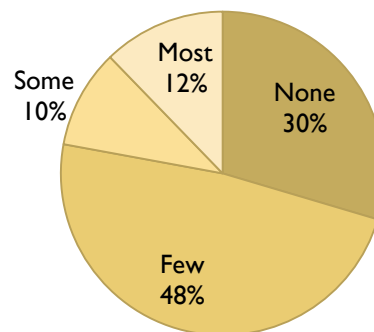
Technology Skills in Job Descriptions

The rate of nonprofit *jobs* in the region that have tech skills in their job descriptions is clearly on the rise. After seeing a jump from 31% to 36% in 2006, we see a giant leap to 50% in 2008. Statistical anomalies in the sample may exaggerate the jump from 2006 to 2008, but the upward

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[3] Options for this question were: none, 1-33% of staff, 34-66% and 67-100%

trend is unmistakable. Again, this measure derives from a weighted average of responses, and upticks in the job description rate or the staff size of the largest organizations can exert a large influence on the overall rate. Technology infuses so much of our work today that articulating the skills necessary to carry out all kinds of jobs makes for better hiring and performance.

Tech Skills in Job Descriptions
% of all NP Jobs with Tech Skills in Descriptions
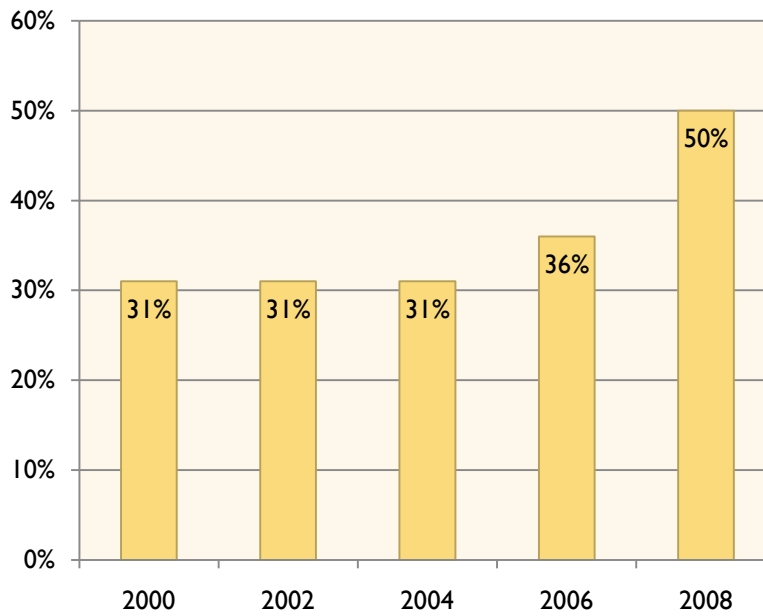
Despite mixed trends in specific brackets (none, few, some, most), we can say again in 2008 that there are fewer organizations than in any prior survey with tech skills in *no* job descriptions and more organizations including them in most (67-100%) of their job descriptions.

When we drill further into the data, we see a discernible difference between the state of job descriptions based on staff size. The smallest organizations are the likelier than the larger ones to show the two extreme states. Nearly a quarter of staffs 10 and under have tech skills in no job descriptions. On the other hand, over 35% of them list tech skills in most job destriptions.

Technology Skills in Job Descriptions
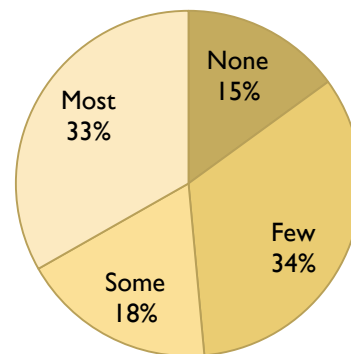
Two stories emerge. First, the smallest organizations may lack job descriptions altogether. Second, if they have job descriptions, they acknowledge that at that size, most everyone will be called upon to use technology in their jobs. At the other extreme in the largest organizations, we see a different profile. There are tech skills in someone's job description at all of the organizations over 30 employees.

The heaviest concentration is in the 1-33% bracket, though. Again, two stories can be told here. First, the larger the organization, the more likely it is to have positions that are consumed with program delivery and have little office time – think performing artists, residential facility staff and tutors. Someone is supporting the technology, and many people are using it, but not everybody. Second, as the org chart grows, the functions – including technology-demanding functions – sort themselves into bureaucratic order. A smaller proportion of people having tech skills in job descriptions would be consistent with more specialized positions that can only come with scale.

Tech in Job Descriptions by Staff Size
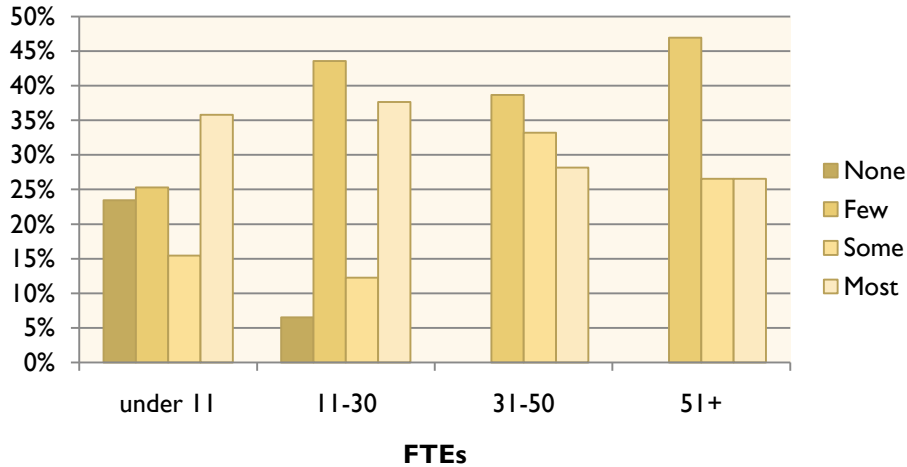
Tech Skills in Job Descriptions Related to Training Rate

Although the majority of our findings are descriptive, some causal conclusions emerge. Again in 2008, the pattern clearly shows that organizations that list tech skills in job descriptions are more likely to send their employees to tech training. In organizations with tech skills in nobody's job description, only 7% of staff got IT training in the last year. In organizations in which most job descriptions articulate required tech skills, a third of employees got training.

Tech Skills in Job Descriptions vs. Training
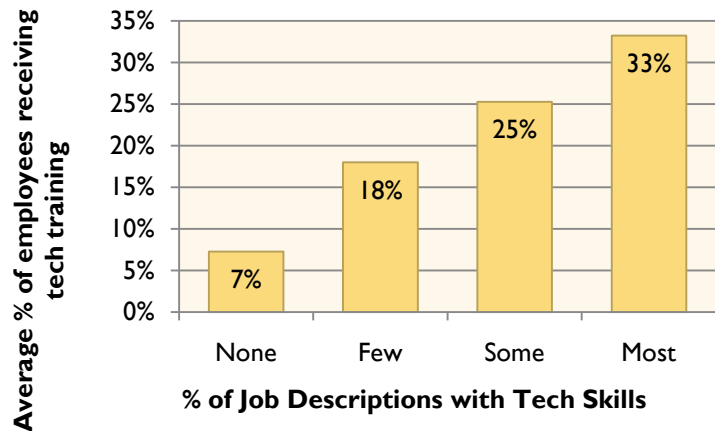
Foundation Proposals

In 2006, we added questions to examine whether nonprofits include technology costs in their foundation proposals and what kind of success they have. The answers were very surprising in 2006, and 2008's answers indicate that this result did not derive from an anomalous sample.

Included Tech in Foundation Proposal
(this year)
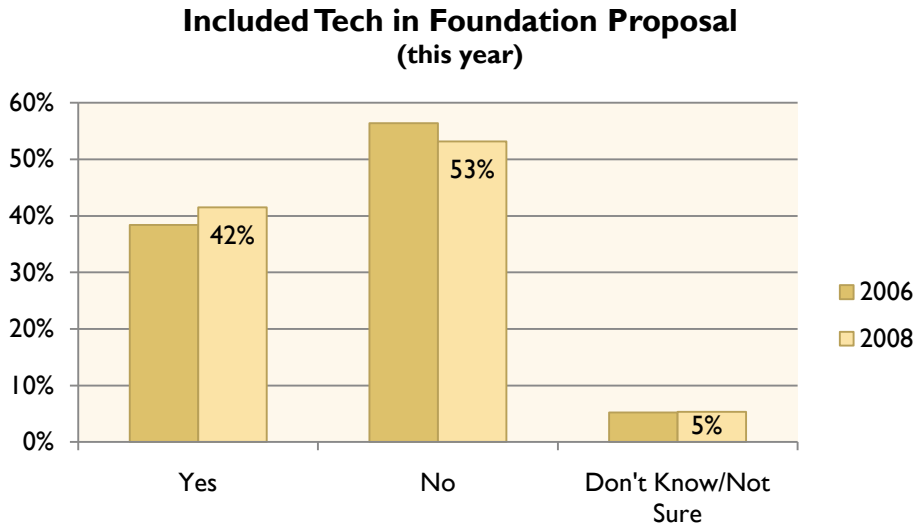
Slightly more organizations included tech costs in foundation proposals in 2008 than 2006. This is not where the surprises lie. For one thing, this rate tracks closely with the rate of budgeting for technology. The 2008 data again confirm a hypothesis regarding the relationship between tech budgeting and tech in foundation proposals: that those that track tech spending are more likely to include tech costs in proposals. While not dramatic, the correlation between the two factors is significant: 54% of the organizations that include tech costs in foundation proposals have tech line items in their budgets vs. 43% among those that do not put tech costs in their proposals.

Beyond whether they'd included tech in a proposal, the survey asked how much of the proposal was for technology. We found concentrations at the two extremes. In just over half of the proposals, tech constituted less than a third of the budget. We would like to think that those proposals use something like the 4-6% benchmark referenced tech budgeting section. At the other extreme are the all-tech proposals (33%).

Tech Proportion of Foundation Proposal
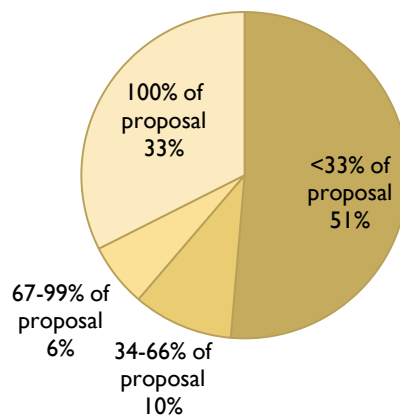
Finally, we asked about the success of these proposals. We thought 2006 was a good year for technology funding from foundations. It turns out 2008 was even better: 89% had the tech portion funded, up from 75% in 2006. The majority received the full amount requested.

Was Proposal Funded?	2006	2008
Fully	52%	60%
Partially, Tech Funded	23%	29%
Partially, Tech Cut	2%	1%
No	23%	10%

In considering the above two questions, we again had a hypothesis: the lower the size of the tech portion of a proposal, the more likely the tech portion was to be funded. Here, finally, was the surprise. According to both our 2006 and 2008 samples, 100% technology proposals get funded at least as often as small portion technology proposals. In 2008, the technology in proposals was funded in 90% of both minority-tech and all-tech proposals. The all-tech proposals were more likely to be funded completely by a dramatic margin (81% vs. 52%). Every proposal that devoted the majority (but not all) of the budget to technology got the tech funded. Finally, the least successful (and that's relative in this highly successful company) proposals were those that were about half tech. These outcomes run counter to the anecdotally-reported practices of program officers who say they don't intend to continue funding all-technology proposals.

Tech Proportion of Proposal vs. Was Proposal Funded?
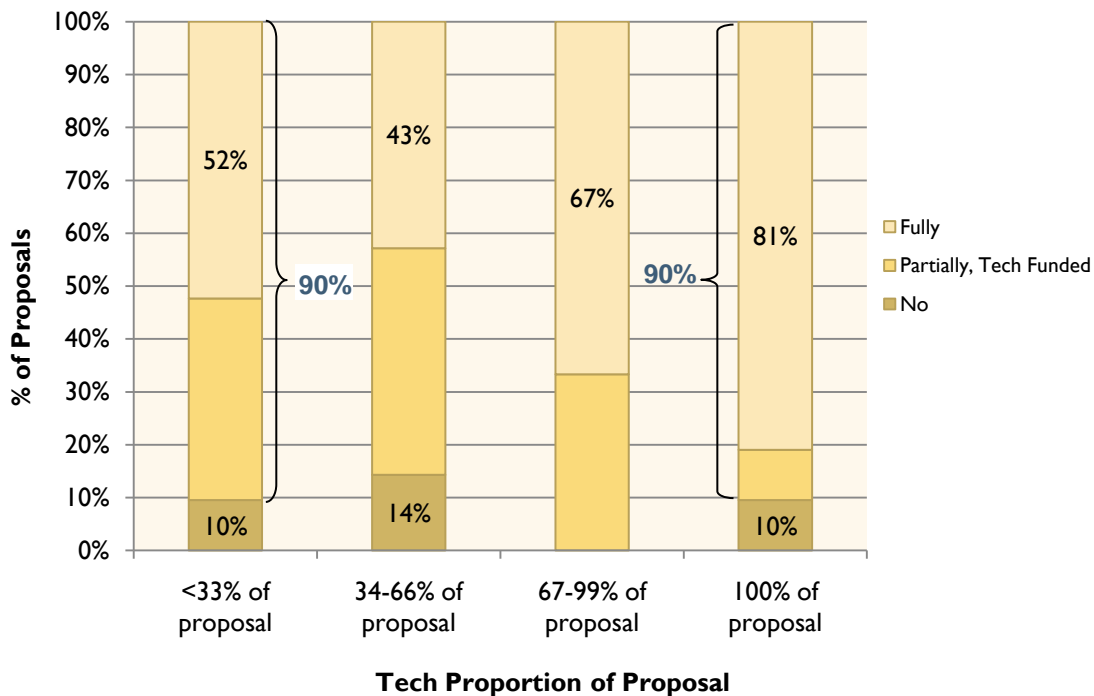
Tech Costs in Contracts

Of course, nonprofits derive revenue from sources other than grants. Many offer services under contract, for instance to government agencies. We were also interested in whether nonprofits accounted for the cost of technology in these contracts.

As the chart shows, many organizations do not provide services under contract. If we focus only on those that do (i.e. a Yes or No answer to the question), we find a similar rate to tech in foundation proposals: 45% of service-providing organizations include tech costs in those contracts. Again, budgeting for tech correlates with working costs into contracts: 58% of nonprofits that include tech costs in contracts have a tech budget, versus 47% of those that do not include tech costs in contracts.

Tech Costs in Contracts

Although we examine links between the mission of the organization and many measures in the survey, very few of these crosstabs produce any interesting patterns. The comparison regarding tech costs in contracts does produce some intuition-confirming correlations.

First of all, health and human service organizations are most likely to include tech costs in contracts. Nearly half of faith-based organizations do so. Arts and environmental groups are least likely to include tech costs in contracts.
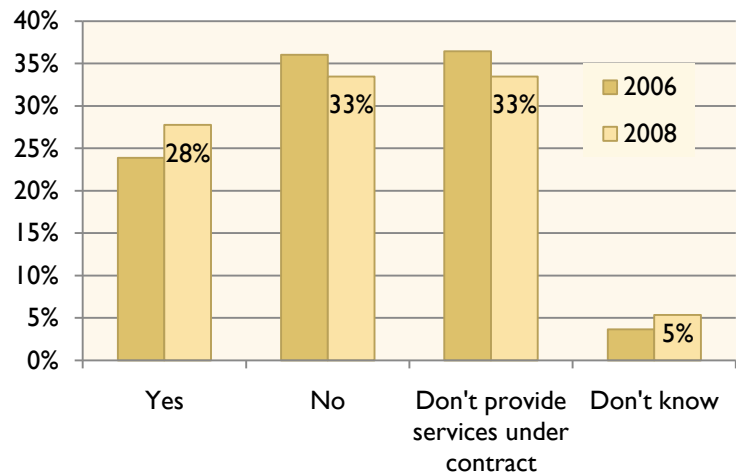
Tech Costs in Contracts by Org Type
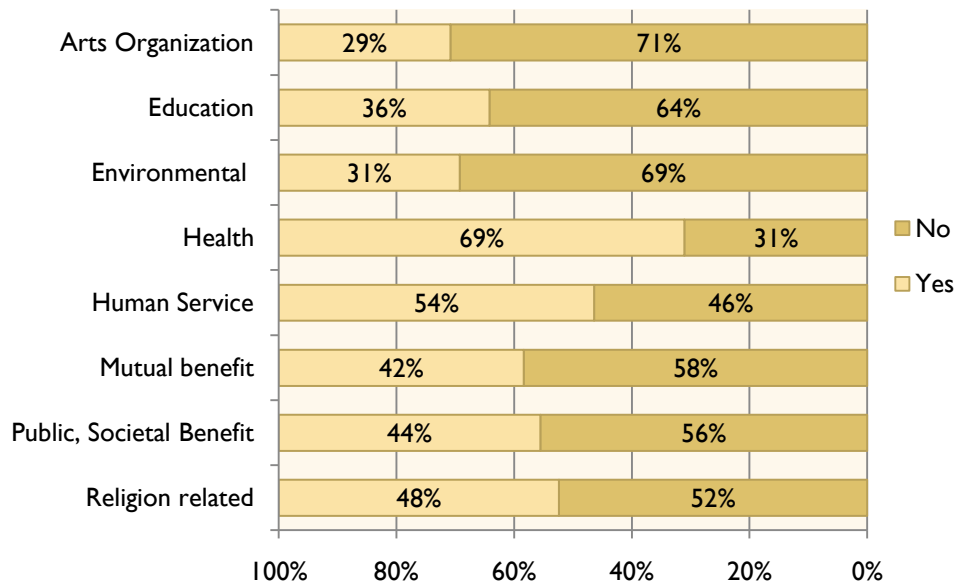
Technology Committee

Past surveys have shown an important link between having a technology committee and adopting best practices in technology management. Tech committees can draw expertise and opinion from across the staff and from board members. Still, having a tech committee remains a distinctly minority practice. Tech committees declined slightly from an eight-year high of 24% of respondents in 2006 to 22% in 2008. The balance shifted nominally toward committees with at least one board member.

Technology Committee
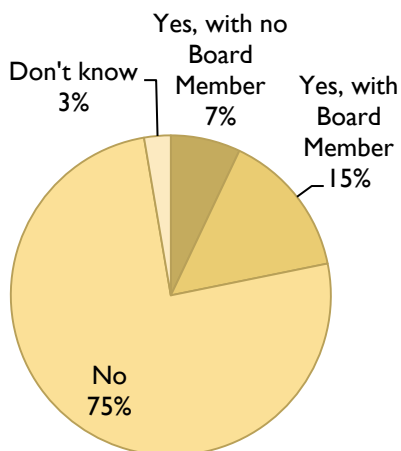
In 2000, the organizations that had a board technology committee tended to be smaller than those that didn't. In 2002 that profile flipped, and the size difference persists in the general question of whether an organization has a tech committees. The median staff size for organizations with a tech committee is 15 versus 6 for those that do not.   In 2006, a distinct size difference emerged between those that have a board member on the committee and those that do not. The pattern continues in 2008. Board tech committees have a much lower median staff size (11.5) than staff tech committees (47). A similar ratio exists in budget ($1.2M vs. $4M). After a certain size, it seems that board members need not get involved with technology; it becomes an operational tool with adequate staff oversight.

The size analysis matters because the different committee profiles align with different adoption rates for tech best practices. In 2004, board committees were superior to staff committees. In 2006, staff committees looked to be the clear-cut winner. In 2008, the results are more ambiguous. Staff tech committee orgs are most likely to have dedicated tech staff and to have a written tech plan (90%!). The link between staff-only tech committees and dedicated tech staff makes sense because once a staff member is officially identified, there may be less need for board input. The link to tech planning jives with a staff group wanting its marching orders codified. A third measure, budgeting for technology, is slightly superior in board tech committees. Board authority may enable budgetary authority.

Tech Committee vs. Best Practice
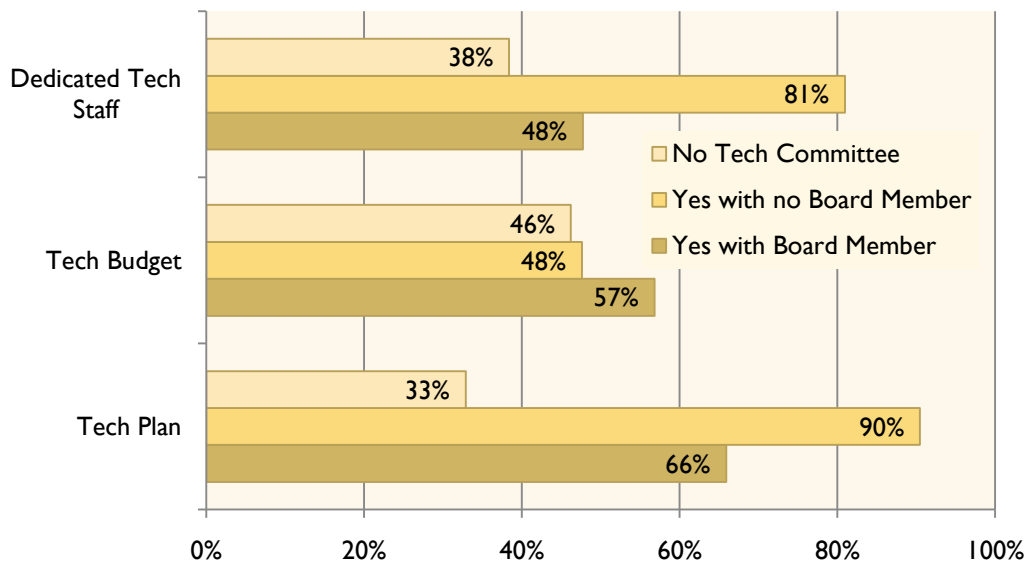
The combination of organizational size dictating the presence of a committee and the differential in the success rate of board vs. staff committees led us to delve deeper into the question. If larger organizations are more likely to have a staff tech committee and staff tech committees perform better, perhaps size is a more powerful factor than the committee. Board members may be helping out most frequently on the tech committees of the small and the struggling.

Because it would be difficult to analyze the micro effects of staff size along the increments laid out in the Respondent Profile section, we again use the threshold of 20 full-time equivalent employees and analyze best practices on either side of that line, ignoring whether the organizations had a tech committee or not. The result showed significant gaps between the large and the small.

Staff Size vs. Best Practice
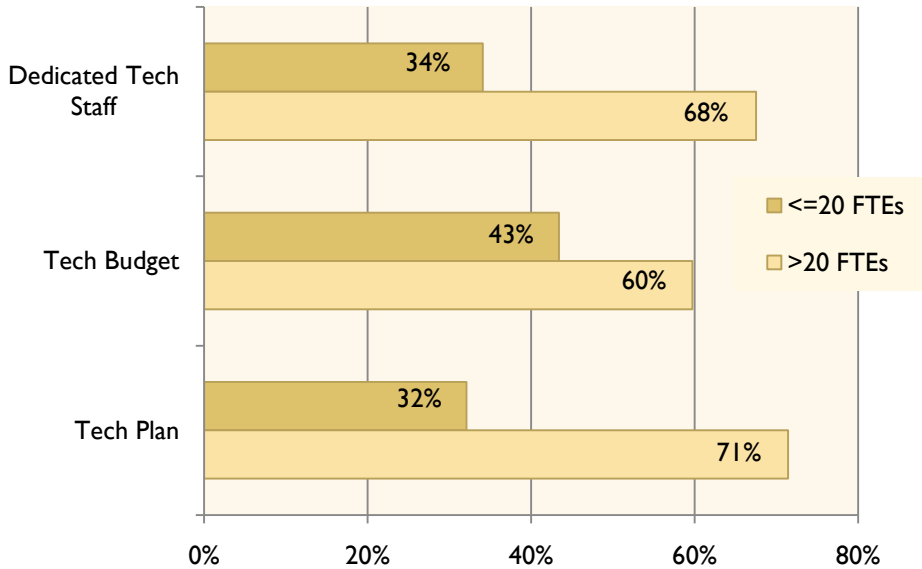
Although previous surveys had analyzed best practices in relation to this threshold without such clear results, we next examined the trend in the gap between over-20 performance and under-20 performance over time. The chart below shows how the percentage point gap has widened over the years of the survey. In other words, as time passes, the best practice adoption gap between large and small organizations grows.

Tech Best Practice vs. Staff Size Threshold
Pct. Point Difference: Orgs with >20 FTEs - Orgs with <=20 FTEs
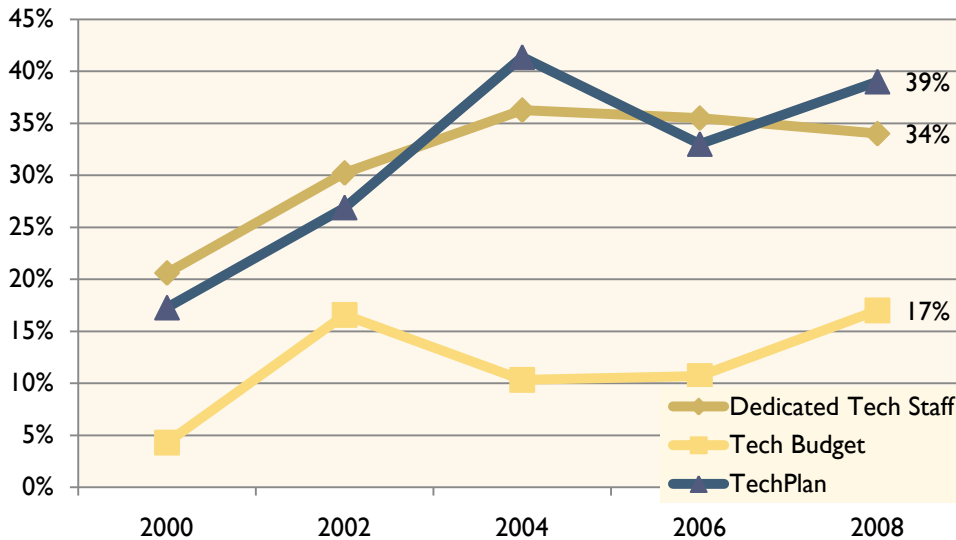
We should be sure not to let this fact get lost in the detail: having a tech committee correlates with higher adoption of best practices, and yet, 75% of organizations do not have a tech committee.

Computer Systems

Change in managing technology happens in a context of increasing speed and capacity of technology tools. We look with interest at whether new technologies are being deployed in area nonprofits. Nonprofits vary in the kinds of computers, software and connectivity they use. Largely, they progress from survey to survey in adopting the tools that can make them work more efficiently and effectively.

Hardware

We sometimes use the analogy of an iceberg for technology spending. The tip of the iceberg is user hardware. There are lots of expenses like ongoing network hardware and services, software licensing, maintenance and training costs that are less obvious. Any given user, however, perceives the organization's IT resources through the keyboard at the end of her fingers.

Although it dismays some nonprofit professionals who maintain a lean ship, the most efficient useful life of a workstation is about three years. The thought of replacing machines every three years can be difficult for thrifty leaders to accept. Machines do not stop running on the first day of their fourth year, of course; they do, however, start to have more and more small failures. In addition, according to Moore's law, hardware's processing capacity doubles every two years.

Software keeps pace with this supply of processing power. Upgrades become impossible on maxed-out older hardware. In a workplace, we concern ourselves with more than just one machine. In a fleet of workstations, holding onto machines older than 3 years can stand in the way of standardized software across an agency.

Computers by Type and Age

All this is to explain why we examine user hardware by its age. We could – and did in the early surveys – break workstations down by processor speed and RAM, but in the end, we only used those attributes to proxy for age. The chart shows that more than half (53%) of the PCs in area nonprofits are under three years old. A third are in that period of creeping obsolescence, 3-5 years. Just over 1 in 10 (11%) defy the odds at over 5 years old. The success of the iPod notwithstanding, Macs make up a tiny sliver of user hardware in area nonprofits. The "other" category is dominated by three agencies using a large number of thin client workstations.

The operating systems mirror these categories of user hardware. The chart below breaks down the operating systems on all of the computers represented in the sample. Windows dominates with a few faithful Mac users. Among Windows users, versions before XP, which had some share in previous surveys, have essentially disappeared. Only 4% of the computers in nonprofits in the region have Vista loaded on them. One in five organizations has Vista loaded on at least one machine, but it's clearly a minority choice at this point.

Total Computers by Operating System
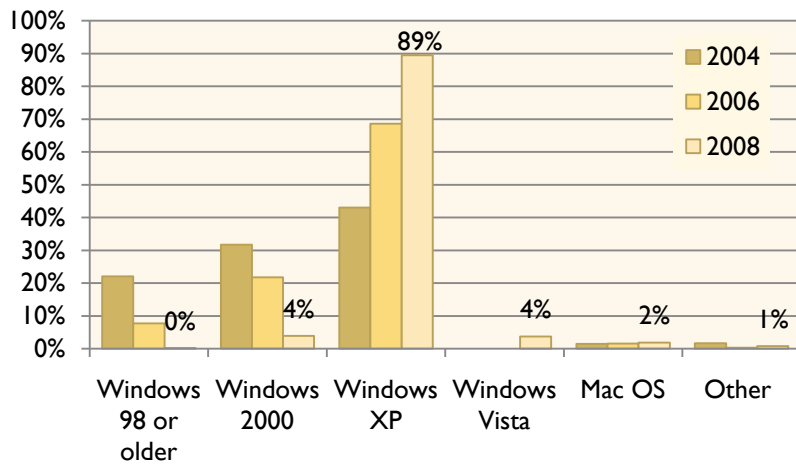
The breakdown of laptops versus desktops shows a noteworthy shift. Laptops make up just 22% of all the user hardware in nonprofits in 2008, up from 16% in 2006. The overall proportion has shifted because laptops make up well over a third (38%) of new workstations. In 2006, only a quarter of new machines were laptops. In addition, over 40% of Macs are laptops. Increasing numbers of laptops represent both desktop replacement and equipping mobile staff.

Desktops vs. Laptops
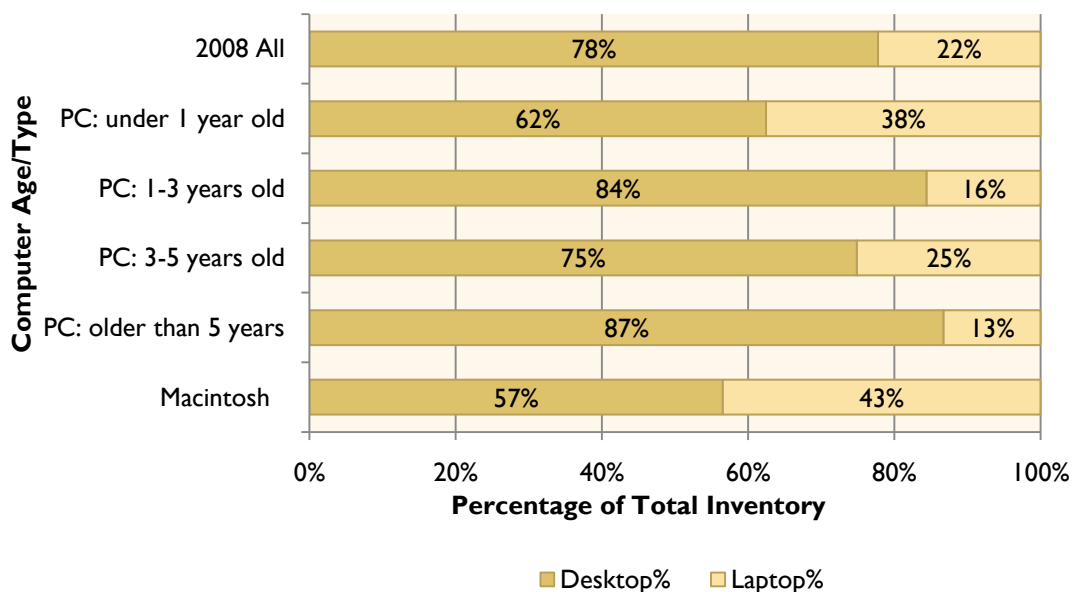
The 2006 results depicted a stark trend. To understand the trend, we must turn back the clock to the context of the 2000-2002 surveys. Fear of the Y2K problem motivated nonprofits to invest in their IT infrastructure just before the turn of the century. Sizable segments of workstation inventories were replaced at once. Our first tech surveys, therefore, depicted nonprofits awash in new hardware. By 2006, the pattern was clear, however: much of that user hardware was aging in place. The post-9/11 recession probably didn't help.

We feared that the trend might continue in 2008. The results are slightly ambiguous, but at the very least, we may have hit bottom in 2006. The number of PCs older than 3 years has diminished. Likely, these dinosaurs were just failing too often to keep around. A rollout of a new operating system (Vista) and Office suite (2007) since the 2006 survey may have been the death knell for these older machines. The software simply will not run without minimum specifications. That story would also account for a nominal uptick in brand new (under-1-year-old) machines. The 3-5 year range is the one bar that follows the prior trend, and that looks like organizations trying to scrape every bit of usefulness out of the machines they own.

Computers by Age/Type
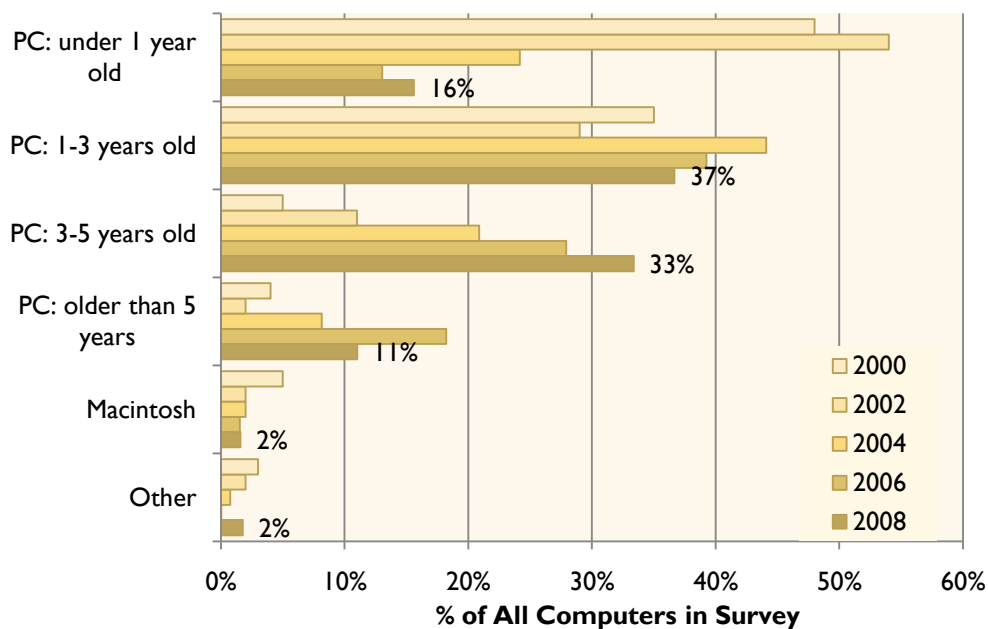
A few bellwethers predict newer or older inventories in any given organization. If an organization keeps computers for more than five years, their general IT infrastructure is more likely to be out of date. If it uses Macs, its inventory may be younger than the norm. In organizations with any 5-year-old computers, old machines account for 24% of the computers, more than twice the general rate. In Mac-using organizations, old machines account for 5%, less than half the general rate. Arts, Membership and Public/Societal Benefit organizations have slightly more Macs than other organization types.

Donated Computers

A new computer is a highly useful donation to a nonprofit. A computer that has run its course in one's home or office represents a burden more than a boon for the recipient. Unfortunately, more of the donations we hear about tend to be in the latter category. The survey presents some good news on that score. The number of organizations with *no* donated computers is 62%, up from 58% in 2006. An additional quarter has donated computers, but they account for less than a third of their inventory. It's rare (7%) to see an organization with mostly donated computers.

Proportion of Computers that are Donated

Some 7%
Most 7%
Few 24%
None 62%
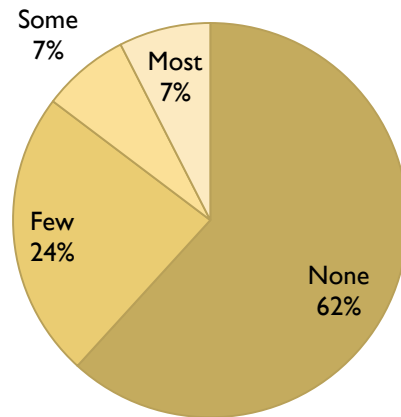
Nonprofits that use donated computers are smaller by every measure: budget, staff size and number of computers. The more donated computers they use, the smaller the organizations get.

	Average			
Proportion	Budget	Tech Budget	FTEs	# of Computers
None	$ 4,523,065	$ 154,271	60.3	43
Few	3,994,656	80,084	53	40
Some	2,115,958	9,623	24.5	25
Most	356,111	2,033	10.7	8

Peripherals

The survey asks about a large variety of peripheral items (see Appendix for complete list). The utilization profile changes little year to year for many items. A few shifts are worth highlighting. LCD projectors continued their steady march and landed in the majority at 59% for the first time in 2008. In our first survey in 2000, only 16% of nonprofits had an LCD projector. Networked copiers and DVD players also crossed into the majority, following a path of steady growth. There appears to be a shift from single bin, small-volume laser printers to multi-bin machines. After holding steady just above a quarter of all nonprofits, call management systems dropped to 21%. Stay tuned until 2010 to see if a bad news trend for lovers of robot menus continues.

Peripheral Changes
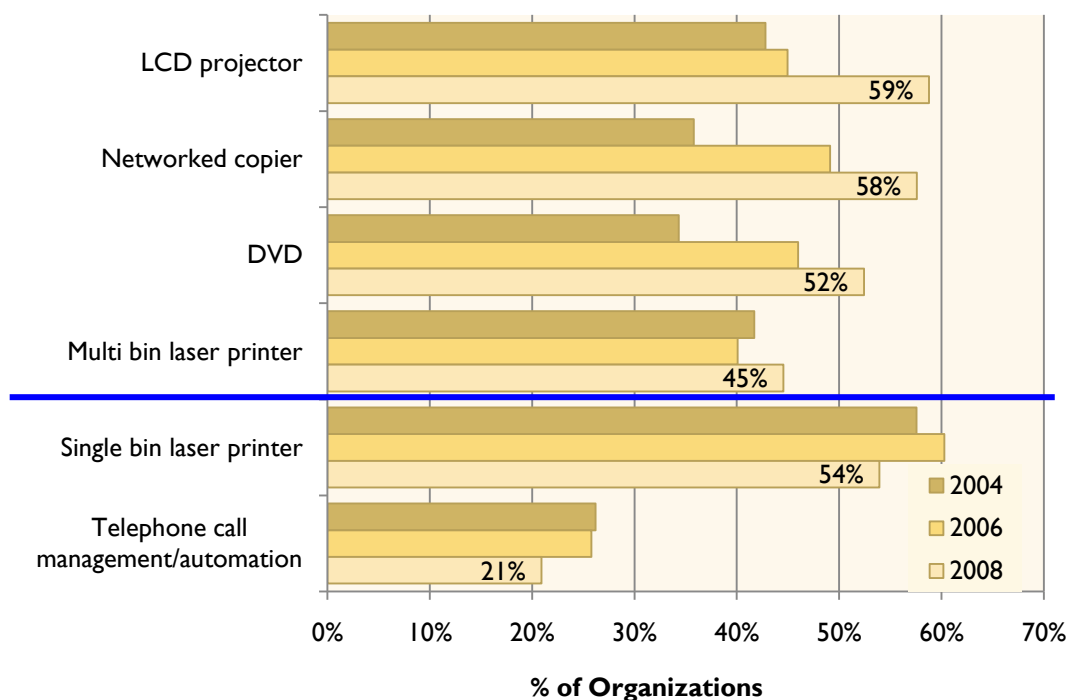
The prevalence of other peripherals is essentially stable with a steady increase in digital cameras, scanners and CD burners.

Other peripherals	2000	2002	2004	2006	2008
Scanner	60%	69%	65%	73%	79%
Digital camera	28%	48%	58%	67%	70%
Tape backup	48%	50%	42%	43%	44%
Ink jet or other color printers	78%	80%	66%	75%	75%
Telephone system with voice mail	68%	71%	73%	81%	80%
CD ROM burner	23%	55%	70%	75%	73%
Fax machine	93%	88%	83%	90%	86%

Connectivity

Local Area Networks

From an early low in 2000 of 72%, the proportion of nonprofits using a network of some kind has grown to 86% in 2008. Variations in survey samples explain vacillation in the proportion of Client-server, peer-to-peer and unknown network types. The "Not Sure What Kind" response has been getting more popular as respondents who are not tech-savvy can at least state that they have some kind of network. The vast majority (69%) of "Not Sure" respondents have 10 or fewer employees. Most likely, the majority can be assumed to be peer-to-peer networks

with a minority being client-server networks. Growth in the "Not Sure" category may explain the drop in reported peer-to-peer networks.

Local Area Networks
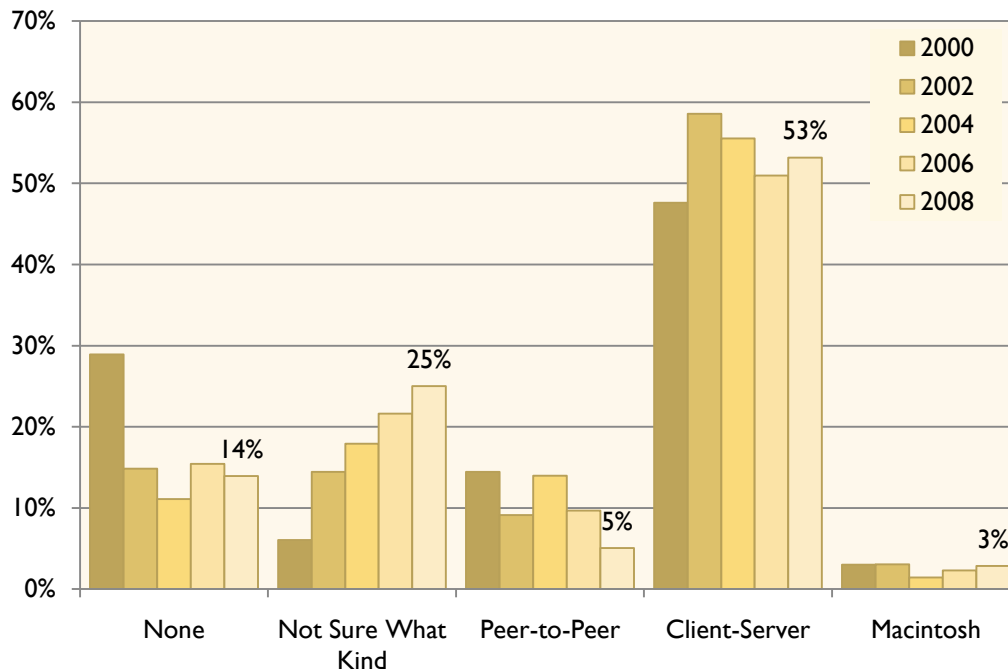
Survey Respondents use a variety of network operating systems. Most client-server networks run Windows 2003 (33%), Windows 2003 Small Business Server (27%) and Windows 2000 (19%). Windows NT networks diminished from 19% in 2006 to 11% in 2008. The migration away from Novell networks continues, dropping steadily from 34% in 2000 to 5% in 2008. A very small number of organizations uses Linux (2%).

Internet Connection

Hardware and networking has certainly changed at a high rate over the course of five surveys. These changes, though, pale in comparison to the pervasion of the Internet in all areas of personal and professional life. Fortunately, each survey has depicted enhanced Internet connections and more intensive use of the Internet by nonprofit staff.

Broadband connectivity continues to become more pervasive in area organizations. Respondents with broadband connections increased from less than a third (32%) in 2000 to a plateau of 79-80% in 2006-2008. In addition, 9% of 2008 respondents use Wireless Internet, up from 3% in 2006. The data suggests that broadband and wireless connections have all but eclipsed dial-up connections.

Internet Connection

Category	Value
None	1%
We have it, not sure what kind	6%
Dial-up	5%
*Dial-up modem on individual machine(s)	3%
*Shared modem	2%
Fixed wireless	9%
Broadband	79%
*Broadband Only	70%
*Broadband + Other	10%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%
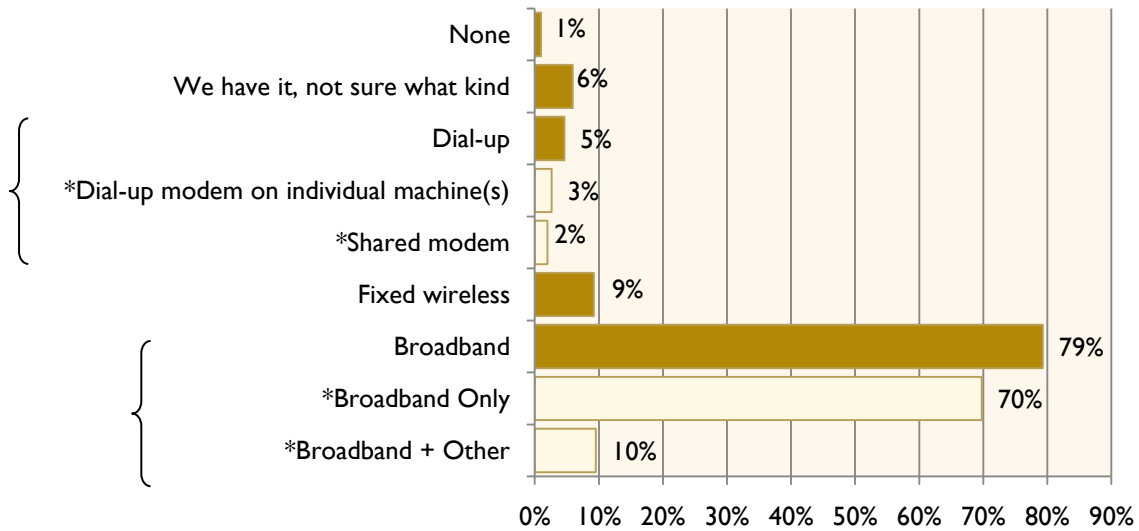
Internet Use

As more users have been connected via high speed connections in prior surveys, the average overall rate of Internet use among nonprofit employees has risen. The 2006 survey suggested a plateau in the overall Internet use rate, and the 2008 survey confirms it. The rate, derived using a bracket-median estimate, has risen just four percentage points from 2004-2008 and just one percentage point from 2006-2008.
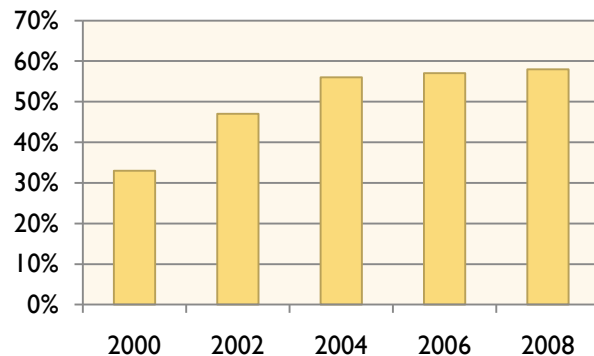
On the other hand, the number of nonprofits that report Internet use as a total minority activity among their staff has dropped steadily. From over 40% in 2000, the number of organizations that indicated that few or none of their employees used the Internet in their jobs dropped to 14% this year. Almost three quarters (72%) of nonprofits indicate that most of their employees use the Internet as part of their jobs, the highest rate in any survey.

How do we reconcile a steadily decreasing number of organizations in which few or none of the employees use the Internet for their work with a stalled growth of overall Internet

Internet Use by Nonprofit Employees

Year	Value
2000	33%
2002	47%
2004	56%
2006	57%
2008	58%

Proportion of Employees who Use the Internet as Part of their Jobs

- None 1%
- Few 13%
- Some 14%
- Most 72%

use among all nonprofit employees? A bracket median estimate is a weighted average, giving greater significance to the responses of large nonprofits. Here, we see a unique split between small and large organizations. In larger organizations, the proportion of respondents that indicate that Most (67-100%) of their employees use the Internet as part of their jobs is much lower than in smaller organizations. A reverse gap appears in the Some (34-66%) response. From the Bayer Center's experience, this can be

Staff Size vs. Internet Use

explained by the presence of front-line program staff who work more outside of office settings than in them. These field staff are reported as using the Internet less in their jobs than office-based personnel.
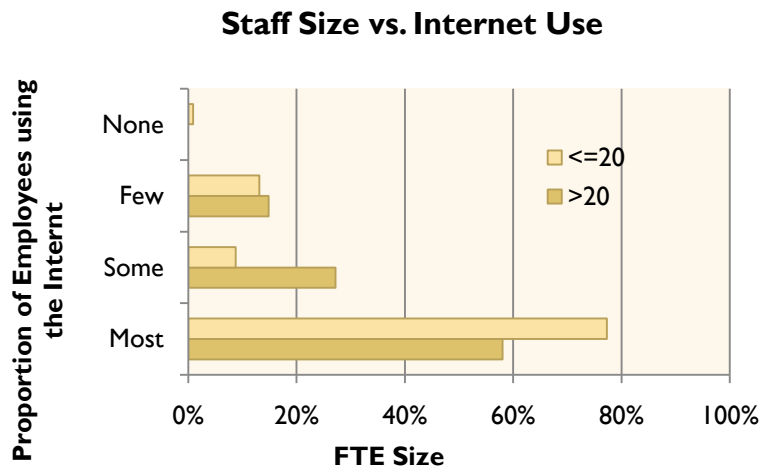
Internal Email

After holding steady around 78% in 2004-2006, the proportion of organizations providing internal email addresses to employees jumped to 85% in 2008. Organizations that do not provide internal email are generally smaller (median 4 FTEs) than those that do (7.5). Although it may be explained by sample variation, this gap in staff size is a good deal smaller than in 2006.

Internal Email
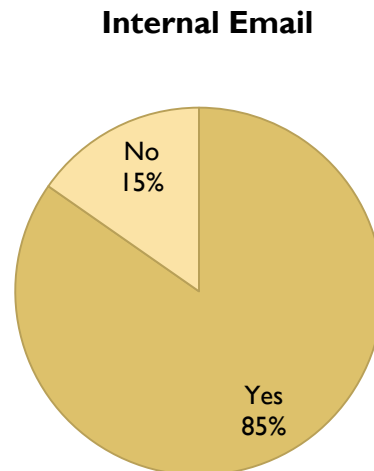
Remote Access

The survey asks about remote access for truly mobile staff members. The 2008 results are very similar to 2006 with the biggest leap coming in PDAs (9% to 16%). Laptops and cell phones remain the most common tools provided to staff on the go. A slowly-growing minority of organizations grant their staff remote access to file servers or databases through a variety of connections: Citrix, PCAnywhere, Terminal Services and VPNs. There has not been a rise in ASP database access, as might have been expected given the Internet access and use trends described above. USB Drive was added as an option in 2008.

Remote Access Tools

Tool	Percentage
Laptop	41%
Cell Phone	33%
PDA	16%
USB Drive	16%
Terminal Services	10%
PCAnywhere	6%
Citrix	5%
Pager	5%
Outside ASP	4%
VPN	4%
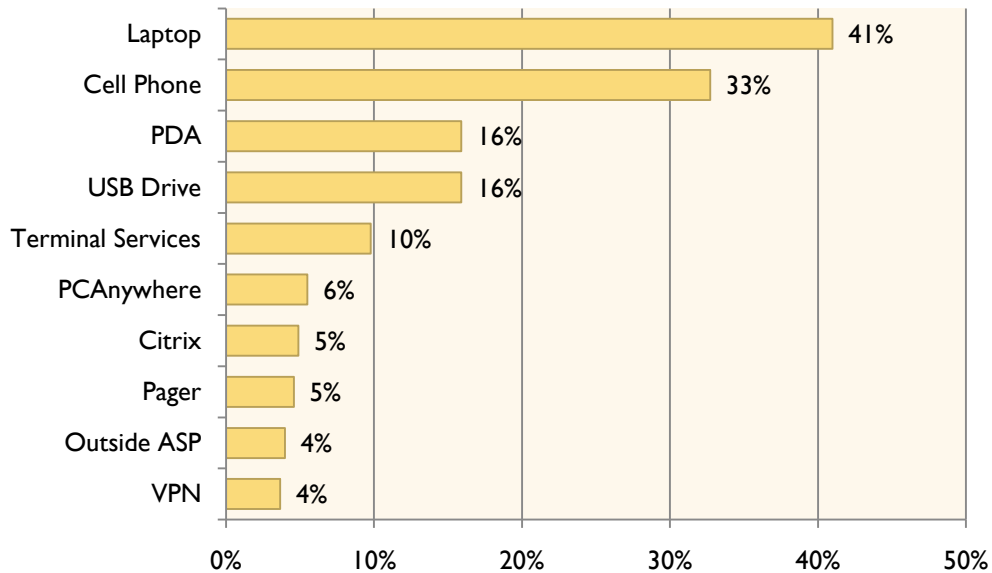
Communication Modes

Although the most common communication tools have changed little proportionally from 2006 to 2008, for the first time, email has tied print for popularity. Print had always eclipsed email slightly. Phone is in a virtual tie at the top with email and print. Managed email systems and interactive web pages have grown in popularity. Podcasting, text messaging and video conferencing have increased, although they are still firmly in the minority. The fax has dropped slightly in popularity.

Communication Channels

Channel	Percentage
Email - direct from you	86%
Print	86%
Phone	85%
Web Site	80%
Fax	80%
Voice Mail	76%
Conference calls	68%
Email - managed email system	61%
Text Messaging	29%
Interactive/e-commerce Web page	28%
Social Networking sites*	23%
Blog*	20%
ICQ, Chat, IM, etc.	17%
Video Conferencing	16%
Podcasting	11%
RSS Feeds*	11%
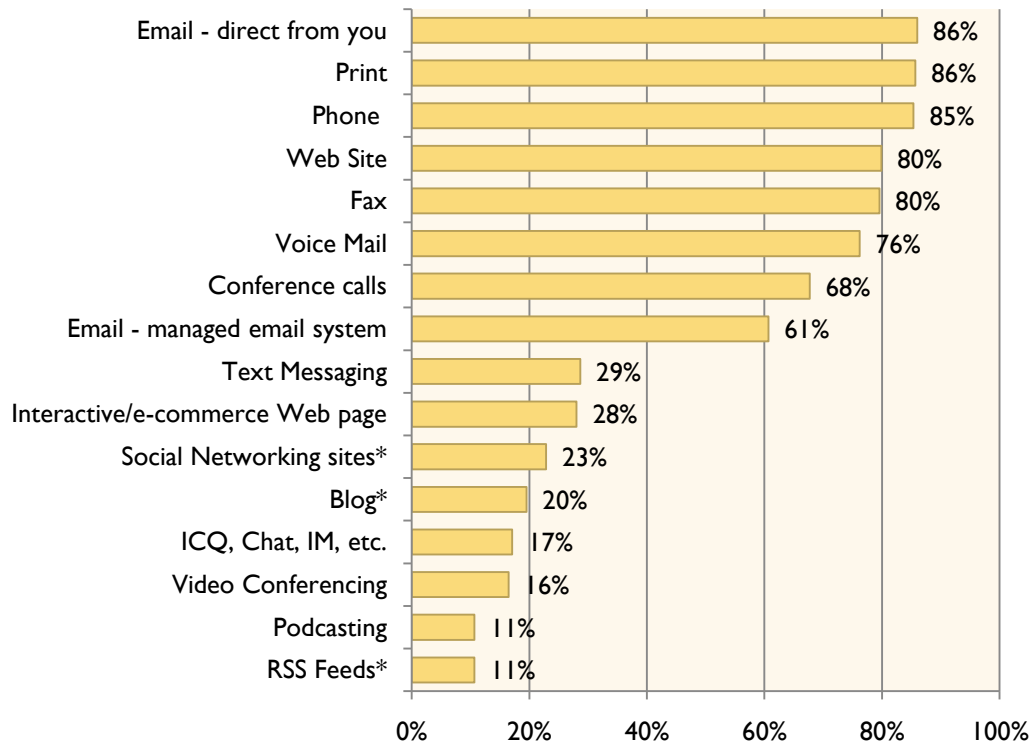
*added in 2008

Communication Channel	2006	2008
Conference calls	68%	68%
Email - direct from you	91%	86%
Email - managed email system	52%	61%
Fax	87%	80%
ICQ, Chat, IM, etc.	15%	17%
Interactive/e-commerce Web page	22%	28%
Phone	92%	85%
Podcasting	3%	11%
Print	91%	86%
Text Messaging	16%	29%
Video Conferencing	12%	16%
Voice Mail	83%	76%
Web page	78%	80%

The survey delves beyond whether organizations use these tools and asks how frequently they do. In this analysis, the minority technologies reveal themselves to be used frequently by very few organizations.   Those organizations that use social networking sites, blogs, RSS feeds and podcasting, use them rarely, not frequently. The phone's frequency held essentially steady from 2006-2008. Managed email systems grew faster in frequency than direct email. Print frequency held steady while fax frequency slipped slightly.

Communication Channel	Frequently	Regularly	Rarely
Phone	**83%**	14%	4%
Email - direct from you	**74%**	23%	3%
Email - managed email system	**68%**	22%	11%
Voice Mail	**57%**	34%	10%
Web Site	**54%**	34%	12%
Print	**52%**	38%	10%
Fax	28%	30%	**43%**
Interactive/eCommerce web page	24%	30%	**46%**
Conference calls	19%	**40%**	41%
Video Conferencing	15%	11%	**74%**
Text Messaging	13%	21%	**66%**
ICQ, Chat, IM, etc.	11%	18%	**71%**
Social Networking sites	11%	21%	**68%**
Blog	9%	27%	**64%**
RSS Feeds	6%	20%	**74%**
Podcasting	0%	9%	**91%**

Bold indicates the most popular frequency response for each channel

Software

The survey covers four categories of software: basic productivity, accounting tasks, database or list management and network/data management tasks. While basic productivity software use is consistently and increasingly uniform, the other three categories are handled in a variety of ways, including manual systems, spreadsheets and outsourcing.

Basic Productivity Software

Microsoft Office continues to dominate the basic productivity market. In 2006, we saw the last non-Microsoft holdouts disappear. Among those who responded to the question, all but the barest minority of organizations use Microsoft Office (Word, Excel, PowerPoint, Access). Some Microsoft users also use Corel Office (WordPerfect, Paradox, QuattroPro, Presentations) or the Lotus Suite (Approach, 1-2-3, WordPro), although these combinations are less frequent with each survey. All organizations that use an open source package (e.g. OpenOffice) also use Microsoft Office.

Basic Productivity Software
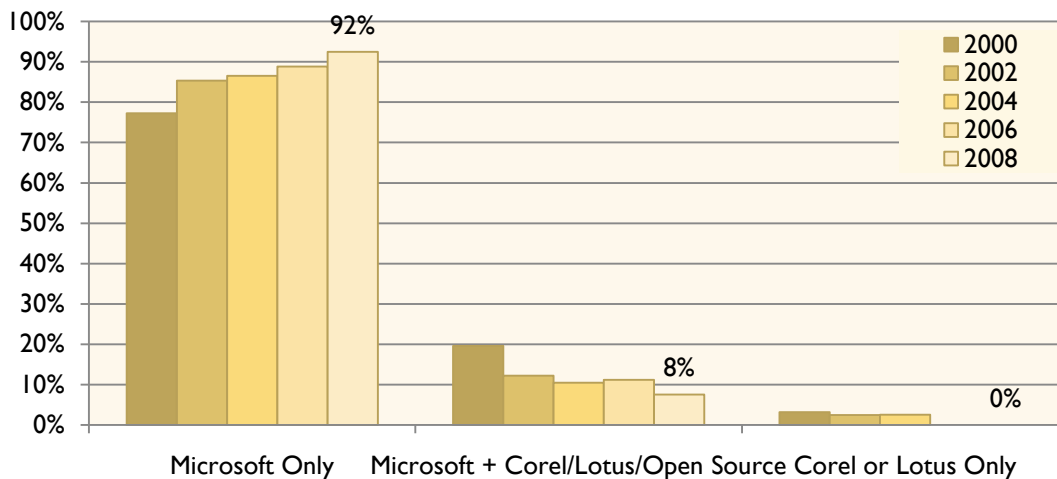
Many organizations (21%) use multiple versions of the Office suite, and they use all manner of combinations. To summarize the data simply, the chart to the right captures the minimum Office package being used. Half of organizations (49%) use a minimum of Office 2003. One in five uses 2007. The most popular single arrangement is 36% organizations using only Office 2003.

Minimum Office Suite
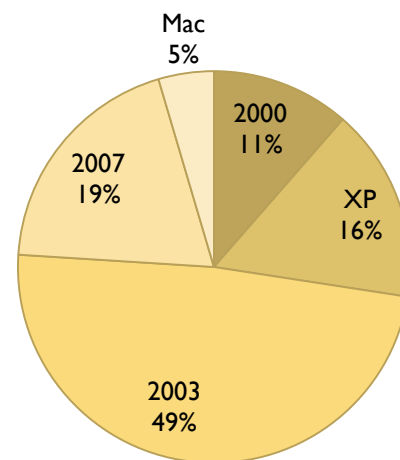
Accounting Tasks and Software

Respondents use a variety of accounting solutions, ranging from manual systems to spreadsheets to accounting software. Increases in outsourcing key accounting functions between 2004 and 2006 persist into 2008. Other than that, the trend is toward more respondents using accounting software for accounting tasks. Shading indicates the max for the task for each year.

Task	No Response	N/A	Manually	Manually + Spreadsheet	Spreadsheet	Accounting Software	Outsourced
2000							
General Ledger	12%	2%	6%	1%	7%	60%	12%
Accounts Receivable	17%	6%	7%	3%	7%	51%	10%
Accounts Payable	16%	3%	5%	2%	7%	56%	11%
Payroll	17%	4%	5%	1%	6%	23%	44%
Budgeting	19%	1%	6%	11%	25%	35%	3%
Cash Flow	22%	6%	5%	4%	17%	37%	8%
Inventory	29%	26%	12%	6%	10%	16%	2%
2002							
General Ledger	10%	2%	7%	1%	6%	68%	7%
Accounts Receivable	11%	7%	5%	1%	10%	62%	4%
Accounts Payable	9%	4%	7%	1%	7%	67%	5%
Payroll	12%	5%	4%	0%	6%	32%	41%
Budgeting	9%	2%	6%	3%	38%	40%	2%
Cash Flow	14%	7%	9%	1%	24%	40%	5%
Inventory	19%	27%	11%	1%	16%	24%	3%
2004							
General Ledger	7%	4%	4%	2%	8%	70%	6%
Accounts Receivable	9%	6%	3%	1%	11%	63%	6%
Accounts Payable	8%	6%	5%	1%	10%	64%	5%
Payroll	11%	9%	2%	0%	5%	31%	41%
Budgeting	5%	2%	6%	3%	35%	45%	3%
Cash Flow	14%	5%	8%	1%	22%	46%	4%
Inventory	21%	23%	12%	0%	19%	22%	4%
2006							
General Ledger	8%	5%	4%	0%	7%	65%	11%
Accounts Receivable	10%	9%	7%	0%	8%	58%	8%
Accounts Payable	9%	7%	8%	0%	8%	60%	8%
Payroll	11%	8%	4%	0%	5%	30%	41%
Budgeting	10%	5%	5%	0%	26%	47%	6%
Cash Flow	11%	8%	7%	0%	15%	52%	7%
Inventory	14%	33%	12%	0%	11%	26%	3%
2008							
General Ledger	5%	3%	3%	0%	7%	72%	11%
Accounts Receivable	8%	5%	4%	0%	7%	66%	9%
Accounts Payable	7%	4%	5%	0%	7%	68%	9%
Payroll	7%	8%	3%	0%	4%	32%	45%
Budgeting	9%	4%	6%	0%	33%	44%	3%
Cash Flow	11%	5%	8%	1%	23%	46%	6%
Inventory	12%	30%	7%	1%	22%	25%	2%

Organizations tend to use one software package across the accounting functions of general ledger, receivables, payables and cash flow. QuickBooks still dominates this market, although its share drops from a high of 62% in 2006 to 53% this year. Peachtree's 8% and Sage/MIP's 5% held essentially steady. BlackBaud's financial edge saw a nominal increase, and Microsoft's Dynamics GP (and its predecessor Great Plains) grew to 5%. Breathtaking diversity marks the rest of the nonprofit accounting software market with 68 different solutions used in a quarter of the organizations.

Accounting Software
(GL, AP,AR,Budgeting, Cash Flow)
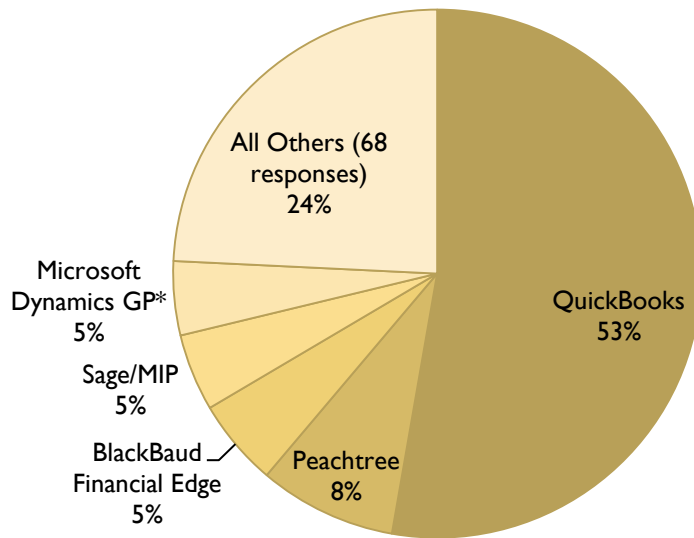
Payroll remains the most likely function to be outsourced, growing to an 8-year high of 45%. Inventory remains a function that many organizations (at least 30%) don't need to perform.

Database/List Tasks

A consistent survey finding that matches the Bayer Center's observations of nonprofits' IT adoption is that a surprising number of nonprofits lack a proper database solution for data management tasks. The trend toward database software thankfully continues from 2006 to 2008. Very few respondents outsource these tasks. As in prior years, a few tasks don't apply to a large number of respondents: Ticketing/Point of Sale and Quality Assurance.   We've only analyzed Outcomes Measurement in the two most recent surveys. More organizations indicate that they track outcomes than sell tickets or do Quality Assurance, but still less than fundraising, client management and volunteers. Among those who track outcomes, nearly a majority report using a database software for the task.

2008 Southwestern Pennsylvania Nonprofit Technology Survey
Bayer Center for Nonprofit Management, Robert Morris University

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Database Tasks							
Task	No Response	N/A	Manually	Manually + Spreadsheet	Spreadsheet	Database Software	Outsourced
2000							
Client Management	18%	16%	12%	2%	8%	43%	2%
Fundraising	18%	13%	19%	2%	15%	33%	1%
Volunteers	20%	21%	28%	2%	8%	21%	0%
Ticketing/Point of Sale	33%	47%	8%	5%	1%	5%	1%
Quality Assurance	34%	54%	6%	1%	1%	3%	0%
2002							
Client Management	12%	10%	10%	3%	10%	55%	0%
Fundraising	13%	11%	14%	2%	15%	44%	1%
Volunteers	18%	18%	21%	2%	13%	27%	0%
Ticketing/Point of Sale	28%	47%	6%	1%	4%	13%	1%
Quality Assurance	34%	54%	6%	0%	2%	4%	0%
2004							
Client Management	16%	13%	8%	3%	11%	49%	1%
Fundraising	15%	13%	11%	3%	16%	41%	0%
Volunteers	17%	18%	20%	3%	15%	27%	0%
Ticketing/Point of Sale	29%	50%	8%	1%	3%	7%	1%
Quality Assurance	33%	53%	6%	3%	5%	0%	0%
2006							
Client Management	10%	16%	6%	1%	15%	49%	2%
Fundraising	7%	18%	12%	1%	19%	42%	1%
Volunteers	10%	26%	19%	1%	19%	25%	1%
Ticketing/Point of Sale	16%	55%	8%	1%	6%	11%	3%
Quality Assurance	21%	65%	2%	0%	4%	7%	0%
Outcomes Measurement	16%	39%	9%	1%	14%	20%	2%
2008							
Client Management	7%	12%	7%	1%	14%	58%	1%
Fundraising	6%	18%	11%	1%	17%	47%	0%
Volunteers	9%	26%	18%	2%	17%	28%	0%
Ticketing/Point of Sale	13%	55%	6%	1%	6%	16%	3%
Quality Assurance	21%	62%	3%	1%	5%	8%	0%
Outcomes Measurement	15%	33%	9%	2%	15%	23%	1%

Shaded responses in each table indicate the most frequent response.

The most common data management tasks deserve some additional examination. If we remove the organizations for which the task does not apply, we see a more realistic breakdown of how organizations manage vital information. For the first time in our survey, vertical market databases (rather than custom solutions) represent the majority of the databases in all four of these functions. Off-the-shelf options are improving at the same time that organizations are tiring of the custom database development process. That said, market shares remain small in most categories. There is no QuickBooks-like market leader in these functions. The majority of custom databases continue to be developed in Microsoft Access.

Database Tasks (No Response and N/A removed)					
Task	Manually	Manually + Spreadsheet	Spreadsheet	Database Software	Outsourced
2000					
Client Management	18%	3%	12%	64%	3%
Fundraising	28%	3%	21%	47%	1%
Volunteers	47%	3%	14%	36%	0%
2002					
Client Management	12%	3%	13%	71%	1%
Fundraising	18%	2%	20%	58%	1%
Volunteers	33%	3%	21%	43%	0%
2004					
Client Management	11%	4%	15%	69%	1%
Fundraising	15%	4%	23%	58%	1%
Volunteers	31%	4%	23%	41%	1%
2006					
Client Management	9%	2%	20%	66%	3%
Fundraising	16%	1%	26%	56%	1%
Volunteers	29%	2%	29%	38%	2%
Outcomes Measurement	27%	5%	19%	38%	10%
2008					
Client Management	**9%**	2%	17%	**72%**	1%
Fundraising	15%	**2%**	22%	**61%**	0%
Volunteers	28%	**3%**	27%	**43%**	0%
Outcomes Measurement	20%	3%	**20%**	**48%**	9%

Bold indicates increase from 2006-2008.   Shading indicates most popular solution for the task.

Use of database software (rather than spreadsheets or manual systems) to manage client information reversed a nominal decrease in the last survey to reach an eight-year high of 72% in 2008.

After a steady tilt toward custom databases, the majority client management database category shifted to vertical market software (software built specifically for the task – often called an off-the-shelf solution). The 54% off-the-shelf solutions represents a stark reversal from the last two surveys in which only 42% used vertical market software. Despite the overall growth in the use of off-the-shelf client management solutions, there is no market leader here. RClient has 2% overall market share, a figure eclipsed by fundraising software being used to manage client information. The 41% "other vertical market" proportion is made up largely of single organizations using a given solution.

Client Management Software Detail
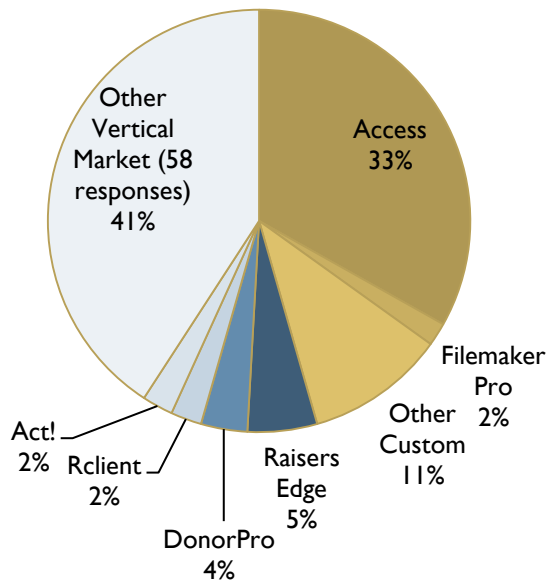
The fundraising function saw similar gains in the use of fundraising software to manage the information. Manual and spreadsheet systems diminished to their 2004 levels. Nonprofits increasingly favor off-the-shelf solutions (64%) rather than custom solutions for fundraising, a more standardized business process than client/service delivery information. The market leader in this group is Blackbaud's Raiser's Edge (18 % of all orgs; 36% of vertical market users), but there are 21 other fundraising packages also in use. DonorPro, a local company with a national customer base, has significant market share in the region. A small group of organizations still uses GiftMaker Pro despite that product being bought out by BlackBaud in early 2006. Salesforce.com's donation program shows up here with 2% of organizations using the ASP CRM package for fundraising tracking. In terms of trends, these results indicate a rise in vertical market fundraising packages from 51% to 58%.

Fundraising Software Detail
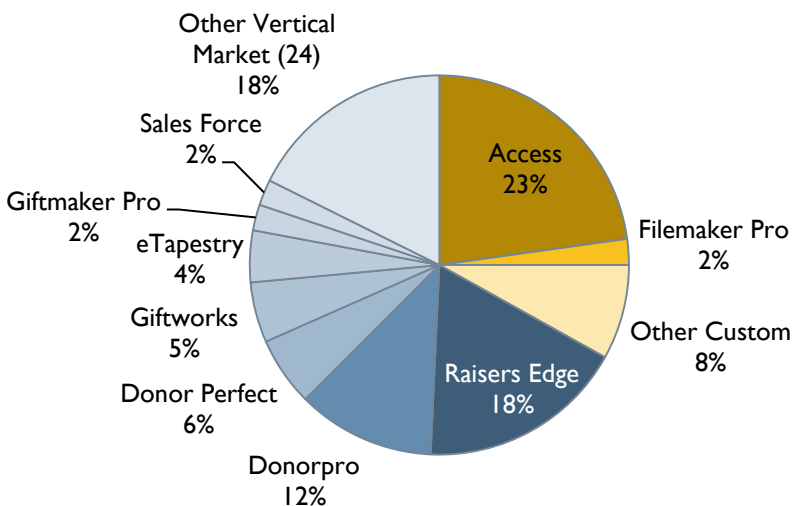
Manual systems for volunteer management remain steady at almost a third of organizations. An increase in database solutions brings the proportion back above 40% this year. The growth there appears to be replacing spreadsheet and outsourced solutions. A growth in vertical market software use (55%) puts custom volunteer management databases in a slight minority. The majority of vertical market volunteer solutions are a module of an overall fundraising package, although 4% of all organizations use VolunteerWorks.

Outcomes measurement is distinguished from the other tasks by the fact that 9% of organizations outsource this function to some third-party evaluator. Nearly half (48%) of those that track outcomes in-house use a database product. On the other hand, one in five use manual systems. The last two years saw a slight majority of custom applications (53%) flip to a slight vertical market majority (55%). The only vertical market solution that has market share is Evaluation Station (3%). Fundraising databases account for 7% of all solutions.

Network and Data Management Tasks

A similar catchall category of network and data management tasks include the defenses of anti-virus protection, data backup and network auditing and the management of user accounts. The surprisingly low numbers for these measures from 2004, the first year we asked about them, have improved across the board with some hitting plateaus from 2006-2008. A large majority of organizations have anti-virus and backup solutions in place. Growing minorities systematically audit their networks and manage user accounts. Not all of these solutions are software solutions, per se. Some are hardware-based. Some – most predominantly in data backup – are manual, human-dependent solutions. Some come as part of a workstation or network operating system.

Network/Data Management Tasks
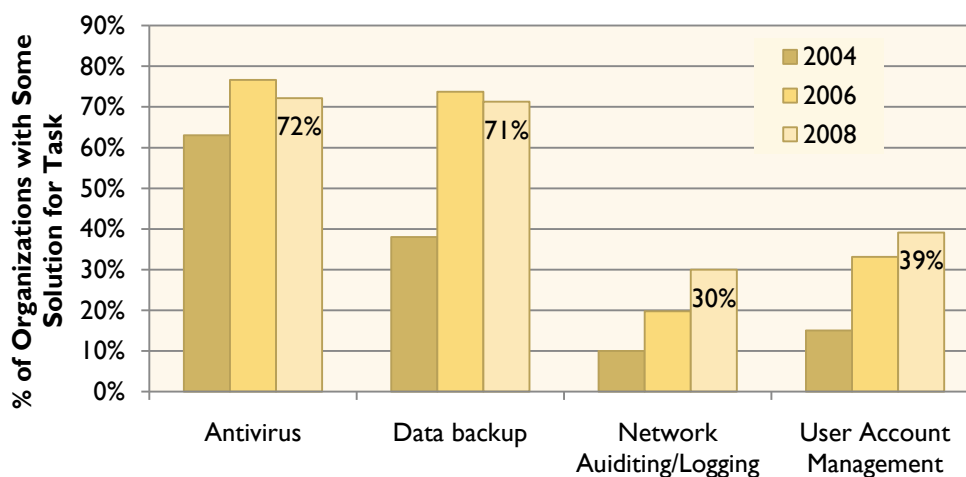
Anti-virus software remains dominated by Norton and Symantec. They may account for even more than half of the organizations represented due to the large number of respondents who knew they had anti-virus software but couldn't identify the name. Likely many of these respondents also use a Norton or Symantec product. AVG, which holds the next largest share, is a free downloadable anti-virus solution.

Antivirus

Norton 28%
Symantec 24%
AVG 12%
McAfee 7%
Trend Micro 5%
Unknown 10%
Other (19 responses) 14%
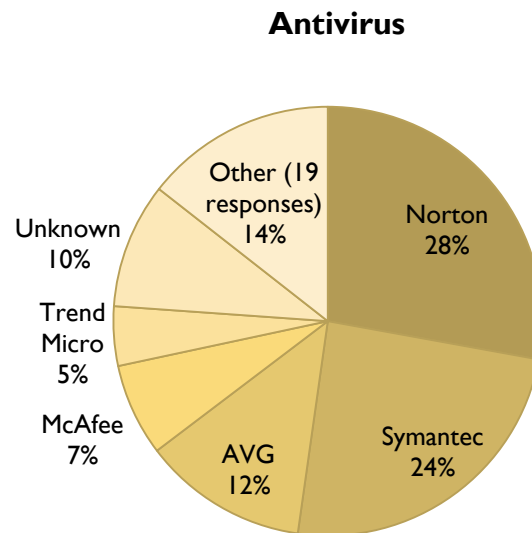
More than 20% of organizations report a manual system for data backup. This statistic can send chills down one's spine as manual systems tend to fall off in the face of more "urgent" tasks despite the fact that data loss tends to the tragic and unexpected. If we add the Tape Backup, External Hard Drive and Removable Media responses, there may be over a third of organizations depending on a human to remember to back up mission-critical data. The Removable Media category includes USB Drives, CDs and Zip drives. Among the more formal solutions, Symantec's Backup Exec leads the way.

Data Backup

Symantec 16%
Veritas 11%
Windows 11%
Tape Backup 10%
External Hard Drive 8%
Unknown 7%
Removable Media* 9%
Other (31 responses) 28%
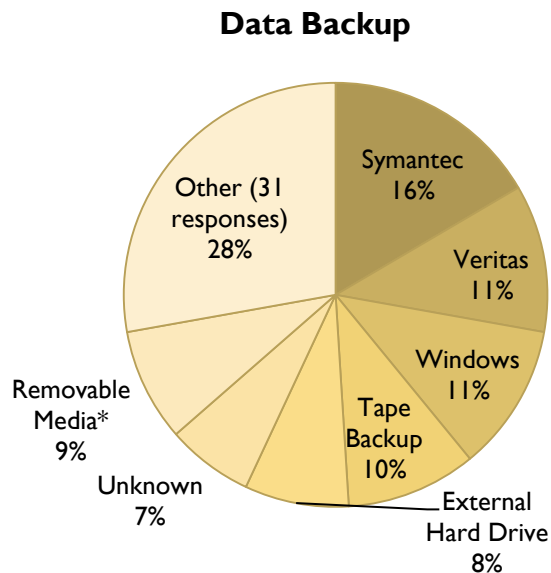
Network auditing and user account management are largely executed within the operating system (Windows, Novell) or a groupware system with Microsoft Exchange being mentioned most frequently.

IT Adoption, Impact and Needs

The survey also collects hard data about soft topics. The more qualitative questions focus on where organizations see themselves on the technology spectrum, how they estimate the impact of technology, their challenges and their IT dreams.

Challenges and Dreams

The most open-ended questions on the survey ask about the biggest challenges with technology and the respondents' IT dreams or next steps. On those few wide-open lines, respondents pour out a variety of responses, both prosaic and surprising.

The most common theme in the challenges centers on money: whether expressed as a lack of funding or the high cost of IT tools. Our choice for most eloquent statement of this challenge is "Big tastes, small budget." A cluster of challenges forms around people. User skill levels need to be raised through training. A lack of an IT Person is a frequent barrier. Finally, buy-in is a barrier both in the form of users reluctant to change and decision-makers who are not swayed by return on investment cases. There is also a desire for more time with which to stay current with advances and to maintain partially obsolete hardware inventories.

Biggest Challenge	Responses
Funding	75
Training/User Skill	68
Staying Current	43
Lack of IT People	37
Buy-in	27
Utilization	26
Maintenance	23
Hardware	21

If the challenges derive from lacking funds and the right people and time in the day, the web dominates dreams. The vast majority of next steps focus on redesigning web sites, gaining control to update web content in-house and making sites more interactive. Some believe specific online tools hold the secrets: "To be on social networking sites to reach a younger audience…". A straightforward hardware dream: "A laptop on every student's and teacher's desk." Some of the dreams and next steps could be achieved with more money in budgets and more of that user buy-in decried above. A set of dreams revolving around integrating applications represents next-generation efficiency hopes. Some of these are uphill battles: "To unite 14 separate programs under one technology umbrella". Some still yearn for Internet access or faster access. Others involve integrating offline data with interactive web tools.

IT Dream/Next Step	Responses
Web Site	75
User Hardware	44
Database	38
Network	36
Software	36
Improved Utilization	23
Online Functionality	21

IT Adoption

A national organization of nonprofit techies, the Nonprofit Technology Network (NTEN), has conducted nation-wide research on various topics. In recent IT staffing surveys, they've asked respondents to evaluate their IT adoption. The spectrum ranges from In Trouble to Leading Edge. The results in the Bayer Center's survey are interesting on their own merits, but they get more interesting when compared with a national sample that NTEN collected in 2007.[4]

The center of the Southwestern Pennsylvania distribution looks like a classic bell curve, peaking at average and falling off equally to the Fast Follower and Lagging Behind groups. At the extremes, however, we are Lake Wobegon.[5] All the children are above average.

Despite obsolete hardware, inadequate software and users who lack the willingness or skill to use IT tools to their full potential, very few people are willing to admit that they are in technology trouble. Perhaps if our survey was anonymous, we'd have different results.

Organizational IT Adoption
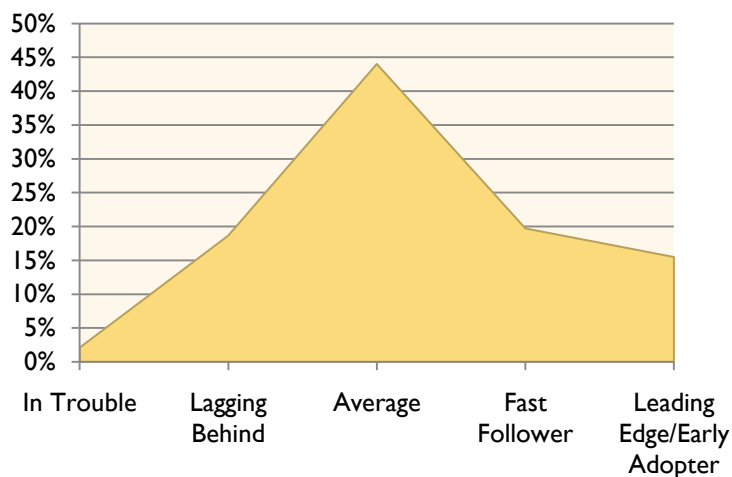
IT Adoption: Southwestern PA vs. the Nation

Whether it's explained by anonymity or the diminished self-concept of non-Pittsburghers, the NTEN survey shows a different distribution. In the national sample, more than a quarter Lag Behind, and a mere 10% are at the Leading Edge. Also, twice as many organizations admit they're in trouble. The national distribution aligns more closely with the Bayer Center's observations of nonprofit technology and with the harder data in the survey.

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[4] "Nonprofit IT Staffing: Staffing Levels, Recruiting, Retention and Outsoucing". Nonprofit Technology Enterprise Network and The NonProfit Times, 2008. Download at www.nten.org.
[5] Lake Wobegon is the fictional hometown of public radio personality and author Garrison Keillor. He ends his weekly stories about the goings-on there with the tagline that in Lake Wobegon, "all the women are strong, all the men are good looking, and all the children are above average."

Organizational IT Adoption
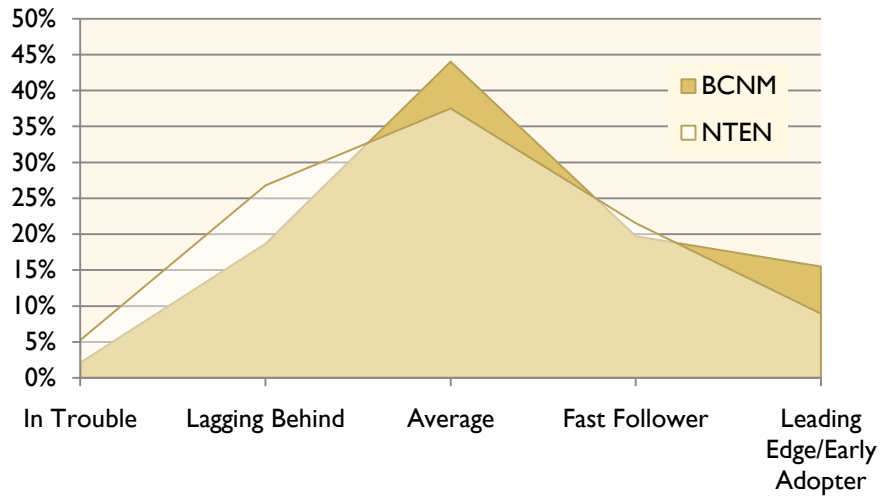
IT Adoption by Organization Size

As with other measures, the respondent pool exhibits great variety. If we distill the results to those who are ahead and those who are behind, different patterns emerge by organizational size. In both budget and staff size, the pattern continues that larger organizations are better off. If we collapse the Fast Follower and Leading Edge categories into an "Ahead" group, the relationship between budget size and IT adoption follows an upward curve with a plateau in the middle.

IT Adoption by Budget Size
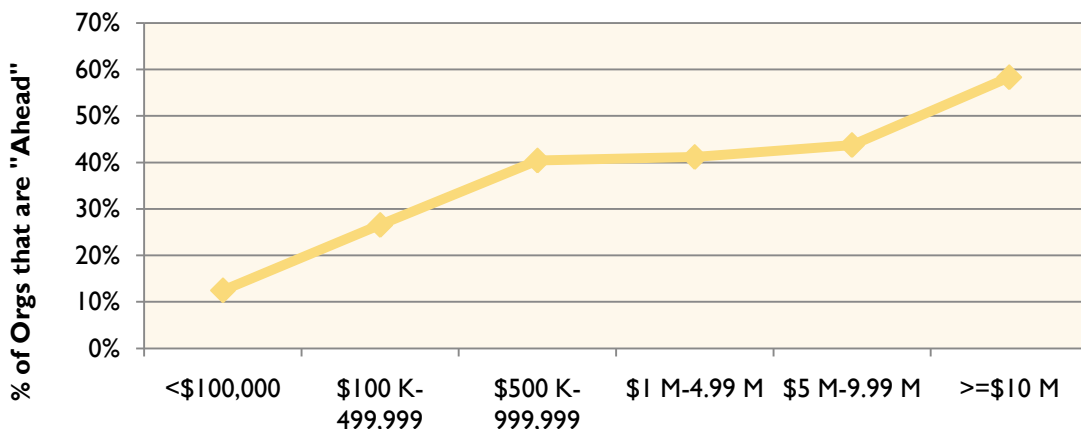
A comparison of staff sizes by our familiar 20-FTE threshold shows that far more of the leading edge perception is in larger organizations. These organizations may be comparing themselves not to their other large peers but to the majority of regional nonprofits, which are smaller than them.

IT Adoption by Staff Size
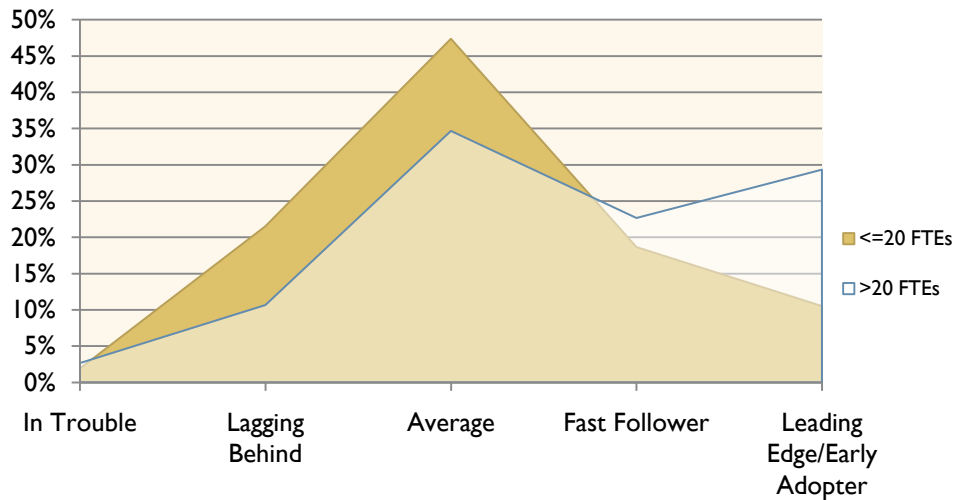
Paradoxically, the less optimistic profile in the NTEN survey represented the perceptions of larger organizations than the Bayer Center's survey pool. NTEN's sample skews much larger than the Bayer Center's. Their recipient pool was made up of their member organizations, discussion board members and the Nonprofit Times's email newsletter subscribers. We can assume that the NTEN pool includes a higher proportion of national nonprofits and that the individuals responding are more tech-savvy. After all, they are either members of national association of nonprofit techies or read its discussion boards or they have subscribed electronically to the content provided by a national nonprofit news outlet. The NTEN survey was distributed virtually completely via email, whereas the Bayer Center's survey mixed electronic and print solicitations for responses. The paradox lies in the fact that the more one knows about the potentials of technology, the less sanguine one may be about an organization's relative position.

	Range	BCNM	NTEN
Small	<$500K	36%	15%
Medium	$500K-2.99M	39%	39%
Large	$3M-10M	15%	23%
Very Large	>$10M	9%	23%

IT Adoption by Technology Decision-Maker

NTEN examined the perception of IT staffing levels on perception of IT adoption. Their survey found a direct connection between whether an organization felt adequately staffed and their perceived level of IT adoption. The responses ranged from 89% of organizations In Trouble feeling understaffed to only 37% of Leading Edge organizations feeling In Trouble. Interestingly, the lowest IT Staff to User ratio (1:17) was in the In Trouble organizations.

The Bayer Center's survey, without asking respondents to rate the adequacy of their IT staff, exhibits a similar pattern. Having at least a full-time tech staff person making the decisions about technology correlated with the highest rates of feeling "ahead" in IT adoption. Having a Part-time techie was about equivalent to having an Accidental Techie or outsourcing the function.

The largest group of organizations that feel "behind" the curve are those in which Board Members or Volunteers make tech decisions.

IT Adoption vs. Tech Management

	Behind	Average	Ahead
Other	33%		33%
Outsourced	17%		22%
Board/Volunteer(s)	45%		23%
Finance Department	17%		45%
Executive Director	23%		31%
Accidental Techie	16%		19%
PT Tech Staff	20%		22%
FT Tech Staff	4%		63%
MIS Dept	13%		58%

■ Behind ■ Average □ Ahead
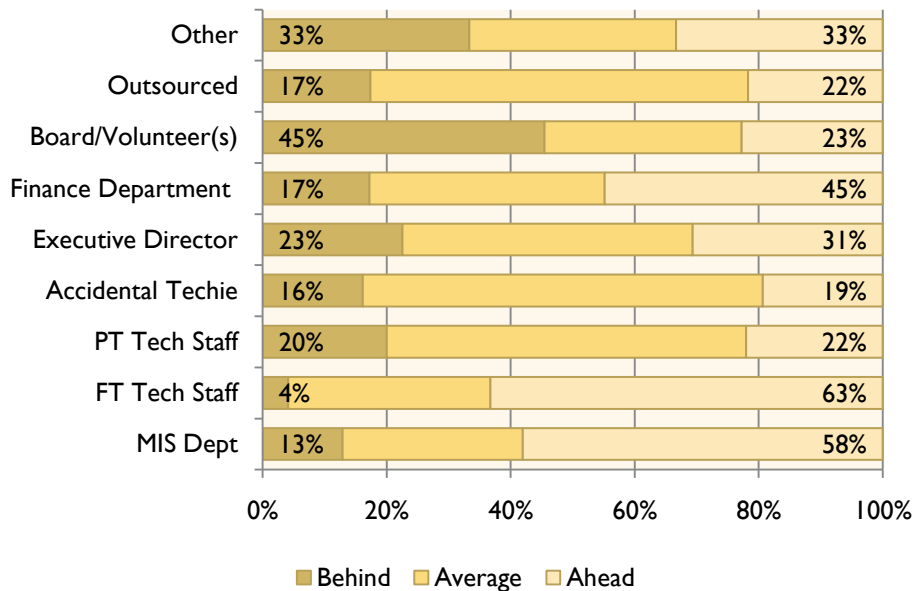
Impact

It is one thing to ask where the organization is on the IT adoption spectrum. It is another thing to ask what impact technology has had. The survey asks people whether they agree with the statement "Technology has substantially changed how we operate". This question has a six-point scale that forces respondents to come down on one side or the other.

Fewer than 20% will disagree at all with this statement. The vast majority agrees, and the most common response (by a smidge) is Strongly Agree. While the percentage that disagrees has held steady from 2004-2008, the agreement has eroded slightly from strong toward mild. In 2004, for example, 34% agreed strongly versus 29% this year.

Technology has Substantially Changed how we Operate
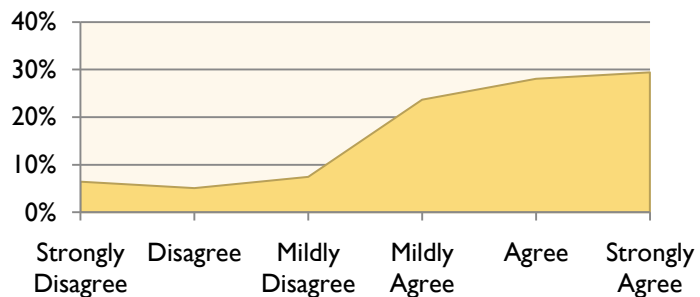
An interesting pattern emerges when impact is measured against size. Larger organizations cluster at both extremes more than their smaller counterparts. The Bayer Center has witnessed this on the ground. Above a certain scale of organization, two things happen: either tech becomes non-negotiable, or acquiring and maintaining adequate technology becomes such a burden that the impact seems to exhibit diminishing returns. In the former case, the culture has shifted in a way that is unlikely to reverse. In the latter, the bigger the bucket, the smaller the drop.

IT Impact by Staff Size
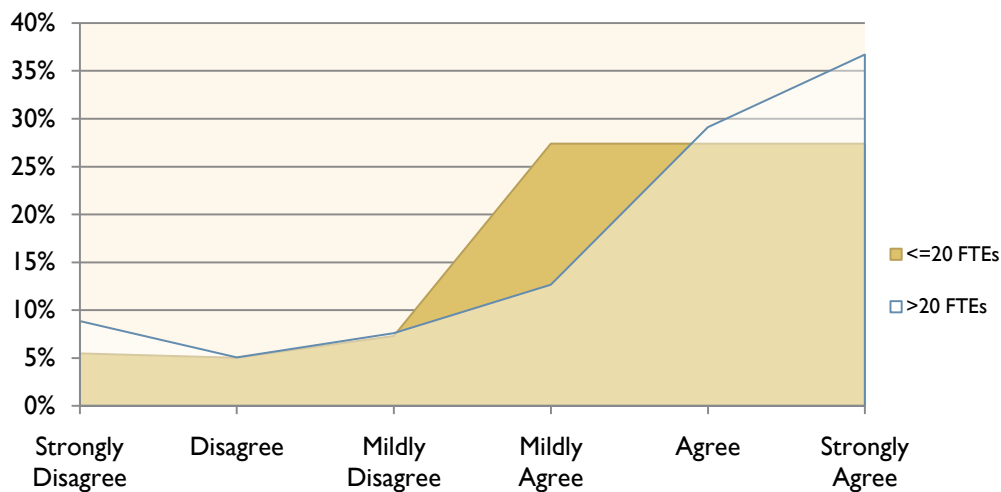
A Final Word…from the Nonprofits Themselves

A selection of Technology Dreams and Next Steps may be the best way to summarize uneven progress. Some are predictable. Many are ambitious. Others are surprisingly minimal for 2008. Taken together, they represent the current moment in nonprofit technology.

What is your organization's Technology Dream or Next Big Step?

"Fully functional website with a competent web master"

"Online registration for 50,000 members"

"…to be on social networking sites to reach a younger audience…"

"A laptop on every student's and teacher's desk"

"…ability to convert documents to PDF"

"Uniform back end data store for all deployed data management systems"

"Just went through hiring an IT person…who has helped us tremendously. Currently need more computers and some software"

"More staff efficiency"

"Laptop with PowerPoint software and projector"

"We got a printer and copier since your last survey, but still don't have Internet"

"I want records I can use as a management tool"

Appendices

ORGANIZATIONAL TECHNOLOGY SELF ASSESSMENT

THANK YOU FOR PARTICIPATING IN THIS SURVEY, WHICH WILL HELP THE BAYER CENTER FOR NONPROFIT MANAGEMENT UPDATE ITS BIANNUAL BENCHMARKS FOR ALL VARIETIES OF AGENCY TYPE, SIZE AND OTHER FACTORS. **(PLEASE RETURN COMPLETED FORM BY AUGUST 15, 2008 TO BE ENTERED IN A DRAWING TO WIN A DIGITAL VIDEO CAMERA)**
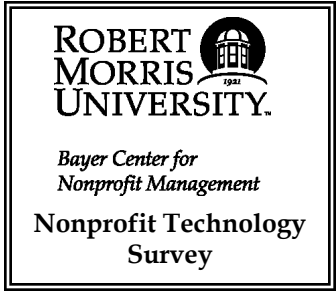
425 SIXTH AVENUE, SUITE 2610 ● PITTSBURGH, PA 15219 ● 412-397-6000 FAX: 412-471-1366 ● WWW.RMU.EDU/BCNM

Organization Name _____ Date _____

Completed by _____ Title _____

Address _____

Web Site URL: _____ E-mail: _____

Phone: (_____)_____ Fax: (_____) _____

Part A: *About your organization:* Please complete this section to the best of your knowledge. For questions 1 through 4, your answers should be consistent with your agency's IRS Form 990 filing.

1) Our overall agency operating budget is $_____ for the fiscal year ending *(month/year)* _____/_____.

2) Our technology budget is $_____   or   ☐ We don't track technology expenses separately.

3) Number of Full-time Equivalent (FTE) employees *(FTE = total hours worked by all staff/40)* _____.

4) Organization can best be classified as: (*Check all that apply. These categories are taken from the National Taxonomy of Exempt Entities (NTEE). Additional information is at* http://nccs.urban.org/ntee-cc/index.htm)

☐ Arts, Culture, and Humanities   ☐ International, Foreign Affairs
☐ Education   ☐ Mutual/Membership Benefit
☐ Environment and Animals   ☐ Public, Societal Benefit
☐ Health   ☐ Religion Related
☐ Human Services   ☐ Unknown, Unclassified

ROBERT MORRIS UNIVERSITY
Bayer Center for Nonprofit Management
Nonprofit Technology Survey

5) Our founding year/ 501(c)(3) ruling year is _____ .

6) How would you describe your organization's IT adoption?

☐ Leading Edge/Early Adopter   ☐ Lagging Behind
☐ Fast Follower   ☐ In Trouble
☐ Average

7) We have a written technology plan that is integrated into the overall strategic plan and mission of the organization. (*check only one*)

☐ We have a strategic plan that addresses technology   ☐ We have neither a strategic plan nor a technology plan
☐ We have a strategic plan, but it doesn't address technology   ☐ Don't know/not sure
☐ We have a technology plan independent of our strategic plan

8) Internally, technology management in our organization is the responsibility of: (*Identify the primary source of internal technology decision making; who decides what gets purchased and what gets thrown away? Check all that apply*)

☐ Don't know/not sure   ☐ A designated staff person with part-time technology responsibilities
☐ MIS Dept with two or more employees   ☐ Unofficial staff interested in technology
☐ Finance Department   ☐ Executive Director
☐ A staff person with full-time technology responsibilities   ☐ Other _____

9) We wish to make the following changes in our computer systems: (*check all that apply*)

☐ No changes are necessary; everything is under control.

	Hardware	Software	Training/Utilization	Web Site
Minor improvement in:	☐	☐	☐	☐
Major improvement in:	☐	☐	☐	☐

10) For what percentage of staff positions are required technology skills listed in job descriptions and included in employee evaluations? (*Count positions if the required technology skills are a written part of their job description and their supervisor regularly evaluates those skills.*)

☐ None ☐ 1-33% ☐ 34-66% ☐ 67-100%

11) Have you included technology expenses in a foundation proposal this year? ☐ Yes ☐ No ☐ Don't Know

    12) If yes, what percentage of the proposal was for technology? _____%

    13) If yes, was proposal funded?

    ☐ Fully ☐ Partially, Tech included ☐ Partially, Tech cut ☐ No ☐ Don't Know/Haven't heard

14) Do you include technology costs in your agency's contracts to provide services? (*e.g. with government agencies*)

☐ Yes ☐ No ☐ Don't provide services under contract ☐ Don't Know

15) Do you have a technology evaluation and planning committee? (*Choose the first* Yes *option if your agency has a technology committee AND at least one* board member *participates in any capacity.*)

☐ Yes, and at least one board member participates ☐ Yes, but no board member participates ☐ No ☐ Don't know

16) Technology has substantially changed how we operate: (*Check only one box where 1 = strongly disagree and 6 = strongly agree.*)

Strongly Disagree ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 Strongly Agree

17) Our biggest challenge with technology is: (*Describe the issues and challenges facing your organization's use of technology.*)

_____

_____

18) What is your organization's technology dream or next big step?

_____

_____

Part B: *Technology Inventory and Resources*: If you feel that you have a good understanding of how technology is used in your organization, please complete this section. If you are unsure, please place a check mark in question #1 and return the survey.

1) ☐ I am not comfortable answering these questions and am returning the survey at this time.

2) Last year, what percentage of staff received some formal technology training as part of their job? (*Training can be classroom or computer based, but there needs to be a curriculum. Check only one.*)

☐ None ☐ 1-33% ☐ 34-66% ☐ 67-100%

3) What percentage of staff use the Internet (Web and e-mail) as part of their jobs? (*What percentage of staff both require and use Internet access as part of their work for the agency? Check only one.*)

☐ None ☐ 1-33% ☐ 34-66% ☐ 67-100%

4) We use the following types, ages and quantities of computer(s): (*Indicate the number of machines in use in any administrative or program delivery capacity – including client-oriented computer lab. Age should indicate date of manufacture, not date received.*)

Type of Computer	Desktops	Laptops
Macintosh	_____	_____
PC: older than 5 years	_____	_____
PC: 3-5 years old	_____	_____
PC: 1-3 years old	_____	_____
PC: under 1 year old	_____	_____
Other (*please specify*) _____	_____	_____

5) What percentage of your computers were donated to your organization?

☐ None ☐ 1-33% ☐ 34-66% ☐ 67-100%

6) What percentage of your computers use the following operating system(s)?:

_____% Windows 2000   _____% Windows ME   _____% Windows XP

_____% Windows Vista   _____% Mac OS   _____% Other (specify) _____

7) Do you provide remote access for truly mobile staff members? *(Those who work the majority of their time in the field, not in a satellite office).*

- ☐ Laptop
- ☐ PDA
- ☐ Cell Phone
- ☐ USB Drive
- ☐ Citrix
- ☐ Data Access through ASP
- ☐ Pager
- ☐ Terminal Services
- ☐ pcAnywhere
- ☐ Other (specify) _____

8) What type of Internet connection does your organization have?

☐ We don't have an Internet connection at this time.

	% of computers with always-on access	% without always-on access	Speed
We have one, but I'm not sure what it is.	_____	_____	_____
Dial-up modem on individual machine(s)	_____	_____	_____
Shared modem (multiple staff share modem from their desks)	_____	_____	_____
Fixed wireless	_____	_____	_____
Broadband (ISDN, DSL, Cable, T1, etc.)	_____	_____	_____

Do you have a firewall? _____   If yes, what kind of firewall? ☐ Hardware ☐ Software

9) We provide internal email addresses to staff. *(Check Yes if staff have addresses with a standardized domain name (e.g. userid@orgname.org))*

- ☐ Yes
- ☐ No
- ☐ Don't Know/Not Sure

10) We use the following Local Area Network (LAN) Network Operating System(s): (*How are computers connected for file and print sharing? If more than one fixed site, indicate number of sites that use the particular NOS*)

- ☐ None
- ☐ We have a LAN, but I'm not sure what kind it is.
- ☐ Windows NT
- ☐ Windows peer-to-peer
- ☐ Windows 2000
- ☐ Windows 2003
- ☐ Windows 2003 Small Business Server
- ☐ Macintosh   Version: _____
- ☐ Other (Linux, Novell, etc.) specify:_____

11) What hardware does your organization use? *(Check all that apply)*

- ☐ Telephone system with voice mail *(Check if your organization uses voice mail)*
- ☐ Telephone call management/automation *(Call center, automated attendant, or other advanced telephone system features.)*
- ☐ Fax machine *(At least one stand-alone fax machine – combination printer/fax machines qualify.)*
- ☐ Scanner *(Any scanner for Optical Character Recognition (OCR) or imaging.)*
- ☐ CD ROM burner *(Can you make your own CDs anywhere in the agency?)*
- ☐ Single bin laser printer *(Any laser printer that uses only one tray at a time.)*
- ☐ Multi bin laser printer – including envelope feeders *(Users can specify one of several available paper trays for their print jobs.)*
- ☐ Ink jet or other color printers *(Any ink jet or bubble jet type printer)*
- ☐ Networked copier *(Copier that allows printing capability from users desk)*
- ☐ LCD projector *(Any projectors for computer or video)*
- ☐ Digital camera *(Any still or motion picture camera producing electronic images)*
- ☐ Tape backup *(The ability to back up data from one or more computers to tape)*
- ☐ DVD *(Digital Video Disk burner or player)*
- ☐ Other *(please specify)* _____

12) We use the following communication channels to maintain contact with key constituent groups (organization members, donors, clients, board, staff, advocates, etc.). *(Please check one and only one box to indicate your level of use for outgoing communications. If your organization does not use a given channel, please check N/A.)*

	Frequently	Regularly	Rarely	N/A		Frequently	Regularly	Rarely	N/A
Print	☐	☐	☐	☐	Phone	☐	☐	☐	☐
Fax	☐	☐	☐	☐	Web site	☐	☐	☐	☐
Email – direct from you	☐	☐	☐	☐	Email – managed email system	☐	☐	☐	☐
Podcasting	☐	☐	☐	☐	Interactive or e-commerce oriented web page	☐	☐	☐	☐
Chat, IM	☐	☐	☐	☐	Video Conferencing	☐	☐	☐	☐
Conference Calls	☐	☐	☐	☐	Text Messaging	☐	☐	☐	☐
Voice Mail	☐	☐	☐	☐	Social Networking sites	☐	☐	☐	☐
Blog	☐	☐	☐	☐	RSS Feeds	☐	☐	☐	☐

13) What basic productivity software packages are in regular use? (*Check all that apply – if you have standardized on a package, check only one.*)

☐ Microsoft Office (Word, Excel, etc.) version: _____   ☐ Corel Office (WordPerfect, Quattro, etc.) version: _____

☐ Lotus Office (WordPro/AmiPro, 123, etc) version: _____   ☐ Open Source (Star Office, Open Office, Google Apps)_____

For the next three questions, indicate how your organization handles accounting (14) database management (15) *and* technology management (16) *issues. If you don't do a task, place an "X" in N/A; Xs are appropriate for manual (*paper and pencil*) and spreadsheet solutions. Please indicate the software or vendor for* Software *and* Outsourced *solutions.*

14) How does your organization manage the following **accounting** tasks? (*See instructions above. Common software packages include* Great Plains, QuickBooks, Peachtree *and others.)*

Accounting Tasks	Tools					
	N/A	Manually	Spreadsheet	Accounting Software (specify)	Outsourced (specify)	Other (specify)
General Ledger	☐	☐	☐	_____	_____	_____
Accounts Receivable	☐	☐	☐	_____	_____	_____
Accounts Payable	☐	☐	☐	_____	_____	_____
Payroll	☐	☐	☐	_____	_____	_____
Budgeting	☐	☐	☐	_____	_____	_____
Cash flow	☐	☐	☐	_____	_____	_____
Inventory	☐	☐	☐	_____	_____	_____

15) How does your organization manage the following **database/list management** tasks? *Common software packages include* Donor Perfect, eTapestry, ResultsPlus, MSAccess, *and others. The task* QA/RU *refers to* Quality Assurance/Resource Utilization)

List Management Tasks	Tools					
	N/A	Manually	Spreadsheet	Database Software (specify)	Outsourced (specify)	Other (specify)
Client Management	☐	☐	☐	_____	_____	_____
Fundraising	☐	☐	☐	_____	_____	_____
Volunteers	☐	☐	☐	_____	_____	_____
Ticketing/point of sale	☐	☐	☐	_____	_____	_____
QA/RU accreditation	☐	☐	☐	_____	_____	_____
Outcomes Measurement	☐	☐	☐	_____	_____	_____

16) How does your organization handle the following **technology management** tasks?

Tech Management Tasks	Tools				
	N/A	Manually	Hardware/Software (specify)	Outsourced (specify)	Frequency
Data Backup	☐	☐	_____	_____	_____
Antivirus	☐	☐	_____	_____	_____
User Account Management (*network/workstation*)	☐	☐	_____	_____	_____
Network Auditing/Logging	☐	☐	_____	_____	_____

17) We use the following resource(s) for technology training: *(Where does staff go for training on the technology they use in their jobs?)*

☐ We don't have a formal training plan; people learn on their own.

☐ Peer support

☐ Commercial classroom-based providers (*specify*: _____)

☐ Internet-based or distance learning training providers (*specify*: _____)

☐ Computer Based Training (CBT) or video (*specify*: _____)

☐ Books, periodicals, self-paced learning (*specify*: _____)

18) What Technical Support Providers do you use? (What's the go-to solution for any problems with technology?)

☐ We have no formal approach to support; staff do the best they can. ☐ In-house MIS staff

☐ We contract for technical support on an as-needed basis. ☐ Volunteers to our agency

☐ Technical support contracts with one or more providers ☐ Friends and family of staff
     (*specify*: _____)

Thank you for your assistance.

Appendix B: Respondent Organizations

Organizations in **bold print** responded to all four surveys. Organizations in *italics* responded in more than one.

A Second Chance, Inc.
accessAbilities, Inc.
ACHIEVA
Adult Literacy Action Penn State Beaver
Advantage Credit Counseling Services
Affordable Comfort, Inc.
African American Chamber of Commerce of W. PA.
AGEHR Area II
Air and Waste Management Association
Airport Corridor Transportation Association
Aliquippa Alliance for Unity & Development
Allegheny County Bar Foundation
Allegheny County Literacy Council Inc.
Allegheny County Special Olympics
Allegheny Health Choices, Inc.
Allegheny Intermediate Unit
Allegheny Mountain Rescue Group
Allegheny Valley Association of Churches
Allegheny Valley School
Alle-Kiski Area HOPE Center, Inc.
Angels' Place, Inc
Armbrust Wesleyan Church
Armstrong County Community Foundation
Armstrong County Council on Alcohol and Other Drugs, Inc.
Armstrong Educational Trust
Arsenal Family & Children's Center
Art Commission
Arthritis Foundation, Western PA Chapter
Arts Education Collaborative
ASSET Inc.
Association of Directory Marketing
Attack Theatre, Inc.
Auberle
August Wilson Center for African American Culture
Bach Choir of Pittsburgh
Beaver County Association for the Blind
Beaver County Genealogy & History Center
Beaver County Historical Research & Land Marks Foundation
Beaver County Humane Society, Inc.
Beaver County Rehabilitation Center
Big Brothers Big Sisters of Grtr PGH
Borough Of New Stanton
Borough Of Sharpsburg
Boys & Girls Club of Western Pennsylvania
Brighton Heights Citizens Federation
Brownsville Area Revitalization Corp.
Building New Hope

Butler County Federated Library System
Calliope: The Pgh. Folk Music Society
Cancer Caring Center
CareerLink
Center for Coalfield Justice
Center for Community Resources, Inc.
Center For Creative Play
Center for Hearing & Deaf Services, Inc.
Center for Nonprofit Excellence
Center for Theater Arts
Charleroi Area School District
Chartiers MH/MR Center
Chatham Baroque
Children's Museum of Pittsburgh
City of Duquesne
Coalition for Christian Outreach
Communities in Schools
Community Child Development Ctr.
Community Design Center of Pittsburgh
Community Development Corporation of Butler County
Community Foundation of Westmoreland County
Community Health Challenge
Community Human Services Corporation
Community Technical Assistance Center
Conemaugh Health Foundations
Connellsville Cultural Trust
Construction Junction
Consumer Health Coalition
Contact Beaver Valley
CONTACT Pittsburgh
Cranberry Township
Crisis Center North
Crohn's & Colitis Fnd. of America W. PA
Delta Gamma Pi Multicultural Sorority, Inc.
Diversity Business Resource Center
Dollar Energy Fund, Inc.
Dress for Success Pittsburgh
Duquesne University Tamburitzans
Earth Force
Earth Mother Enterprises
East Allegheny Community Council
Eden Hall Foundation
Elder Care Services
EMMCO East, Inc.
Fair Housing Partnership Of Greater Pgh, Inc
Faith Based Network
Faith Christian School
Fame
Family House of Pittsburgh

Family Services of Blair County
Family Services of Western PA - PGH
FamilyLinks
Fayette County Conservation District
Findlay Township
First Tee of Pittsburgh
FISA Foundation
Flying Mammal Wildlife Rehabilitation Center
Focus on Renewal
Freedom Unlimited, Inc.
Frick Art & Historical Center
Friends of the Pittsburgh Urban Forest
Friends Of The Riverfront
Gateway Rehabilitation Center
Gateway to the Arts
George Junior Republic
Gerri Holden Ministries, International
Gilda's Club of Western Pennsylvania
Girl Scouts Western Pennsylvania
Girls Hope of Pittsburgh, Inc.
Glenshaw Public Library
Good Grief Center
Grantmakers of Western PA
Grapevine Center
Greater Pittsburgh Arts Council
Greater Pittsburgh Community Food Bank
Green Building Alliance
Greene County Watershed Alliance
Group Against Smog and Pollution
Heinz History Center
Heritage Health Foundation, Inc
Holy Family Institute
Homeless Children's Education Fund
Hosanna Industries
Hoyt Institute of Fine Arts
Independence Conservancy
Institute for Entrepreneurial Excellence
Interfaith Hospitality Network of the South Hills
Interfaith Volunteer Caregivers of Fayette, Inc.
Jewish Family & Children's Service of Pittsburgh
Jewish Residential Services
Junior Achievement
Just Harvest
L.I.V.I.N.G Ministry
Lark Enterprises, Inc.
Laughlin Children's Center
Lawrenceville Corporation
Lawrenceville United
League of Women Voters of Greater Pittsburgh
Lemington Community Services
Lifespan, Inc.
Light of Life Ministries
Lincoln Highway Heritage Corridor, Inc.
Little Sisters Of The Poor
Local Government Academy
Long Run Children's Learning Center

Longe Dominica
Lydia's Place
Macedonia Family & Cmnity Enrich.Center
Magee-Womens Foundation
Marian Manor Corporation
Mario Lemieux Foundation
Mars Home for Youth
Ma's Pantry Food Bank
Massey Center for Business Innovation & Development
McKees Rocks Community Development Corporation
Mental Health America - Allegheny Co.
Mental Health Association In Beaver County
Mental Health Association in Butler County
Mental Health Association of Washington County, Inc.
Mentoring Partnership of Southwestern PA
Meridian U.P. Church Day Care
Metamorphosis Foster Homes
Metro Family Practice, Inc.
Miryam's
Mon Valley Initiative
Mon Yough Community Services, Inc.
Monessen Business Center
Mountain Watershed Association, Inc.
Mt. Lebanon Christian Church
Mt. Lebanon Montessori School, Inc.
Myasthenia Gravis Association, W. PA
Nazareth Housing Services
NEED
Neighbors in the Strip
Neurofibromatosis Clinics Assoc.
North Hills Community Outreach
North Hills Youth Ministry Counseling Center
North Side Christian Health Center
OASIS
Ohio Valley General Hospital
Old Economy Village
Onala Club, Inc.
Operation Better Block, Inc.
Outreach Teen & Family Services
Pace School
Parental Stress Center
Partners in Progress
Peer Support and Advocacy Network
Pennsylvania Association for Sustainable Agriculture
Pennsylvania Cancer Control Consortium
Pennsylvania Legal Aid Network
Pennsylvania Trolley Museum
Pennsylvania West Soccer Association
Pentecostal Temple Development Corporation
PERSAD Center, Inc.
PHDA Inc.
Pittsburgh Action Against Rape

Pittsburgh AIDS Task Force
Pittsburgh Ceili Club
Pittsburgh Community Reinvestment Group
Pittsburgh Downtown Partnership
Pittsburgh Film Office
Pittsburgh Harlequins Rugby Football Association
Pittsburgh Musical Theater
Pittsburgh Partnership for Neighborhood Development
Pittsburgh Pastoral Institute
Pittsburgh Planned Giving Council
Pittsburgh Presbytery
Pittsburgh Regional Minority Purchasing Council
Pittsburgh Social Venture Partners
Pittsburgh Symphony Orchestra
Pittsburgh Zoo and PPG Aquarium
POISE Foundation
Polish Hill Civic Association
POWER
PowerLink
Present Help, Inc.
Prime Time Adult Care
Private Industry Council Wesm'd/Fayette
Providence Connections, Inc.
Radio Information Service
Rainbow Christian Missions
Rainbow Kitchen Community Services
Rankin Christian Center
Rebuilding Together - Pittsburgh
Redeemer Lutheran School
Redevelopment Authority of Fayette County
Renewal, Inc.
Residential Care Services
Richard King Mellon Foundation
River City Brass Band
Rock The World Youth Mission Alliance
Safety Kids Inc.
Salvation Army/East Liberty
Sarah Heinz House
Schenley Heights Community Development
Senior Computer Associates
Seton-La Salle High School
Sewickley Valley Historical Society
Shady Lane
Shakespeare in the Schools
Sharp Visions, Inc.
Shepherd's Heart Fellowship
Sisters Place, Inc.
Slippery Rock Pregnancy Center
Small Seeds Development, Inc.
Smart Futures
SMC Business Councils
Society for American Music
Society for Contemporary Craft
South East Asia Prayer Center

South Hills Chamber of Commerce
Southwestern PA Human Services
Southwinds, Inc.
St. Agnes School
Staunton Farm Foundation
Steel City Biofuels
Stepping Stones Children's Center
Sustainable Pittsburgh
Sweetwater Center for the Arts
The Aircast Foundation
The Allegheny Regional Asset District
The Children's Aid Home Programs
The Children's Home of Pittsburgh & Lemieux Family Center
The Early Learning Institute
The Emmaus Community of Pittsburgh, Inc.
The Grable Foundation
The Hispanic Center of Pittsburgh
The Lighthouse Foundation
The LOGOS Ministry
The Minerals, Metals & Materials Society, Inc.
The Pittsburgh Experiment
The Pittsburgh Project
The Presbyterian Church, Sewickley
Three Rivers Adoption Council
Three Rivers Center for Independent Living
Three Rivers Community Foundation
Three Rivers Connect
Three Rivers Youth
Time-Out Ministries, Inc.
Tobacco Free Allegheny
ToonSeum
Transitional Employment Consultants
Transitional Services, Inc.
Treasure House Fashions
Tri-City Life Center, Inc.
Turtle Creek Watershed Association, Inc.
Union Project
United Cerebral Palsy of Pittsburgh
United Jewish Federation of Greater Pgh.
United Way of Butler County
United Way of Lawrence County
United Way of Westmoreland County
University of Pittsburgh Office of Child Development
Urban Farming Initiative
Urban Impact Foundation
Urban League of Pittsburgh
Urban Youth Action, Inc.
Venture Outdoors
Villa St. Joseph Nursing Care Facility
Vintage, Inc.
Visiting Nurses Association of Butler County
VOICe- Victim Outreach Intervention Center
Voluntary Action Center of Beaver County, Inc.
Volunteers of America PA/Working Order

Ward Home, Inc
Washington City Mission, Inc.
Watchful Shepherd USA
Western Penn Hills Community Action, Inc.
Western Pennsylvania Humane Society
Westmoreland Bar Assoc/Fdn
Westmoreland Casemanagement and Support
Westmoreland Fayette County BSA
Westmoreland Museum of American Art
WestPACS
Whitehall Public Library
With A Golden Spirit, Inc.
Womansplace
Women's Center Of Beaver County
YMCA of McKeesport
YMCA Sewickley Valley
YouthWorks, Inc.

Appendix C: Bayer Center Advisory Board, Staff

Advisory Board
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The Bayer Foundation

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 The Buhl Foundation

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(Retired)

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William Stein
Family Tyes

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